EndNote X7

for

Windows

User Manual

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Where Can I Get Help With EndNote?

The Help menu within Endnote:

A useful and recommended resource.

The CSU Library's Endnote Library Guide:

http://libguides.csu.edu.au/endnote

Any training videos, patches, or changes to the training notes are listed here, as well as frequently asked questions.

Endnote FAQs and Blog:

Someone else has probably had the same problem, so why not check the FAQs & Help tab in the Library's EndNote Guide
http://libguides.csu.edu.au/aecontent.php?pid=539394&sid=4436797

Or keep up to date with the blog?
http://Endnoteblogcsu.blogspot.com/

Ask your friendly Faculty Liaison Librarian:

http://www.csu.edu.au/division/library/research/faculty/
Faculty liaison librarians are based at the Albury-Wodonga, Bathurst, Orange and Wagga Campuses to support academic staff, researchers and postgraduate students.

Book-A-Librarian for some training (academic staff, researchers and postgraduate students only):

If you would like more training, then book a session with one of your Faculty Liaison Librarians. Complete the form found at:
http://csu.altarama.com/reft100.aspx?key=ask_copy4&ref=120

The Thompson & Reuter's Online User Guide:

Thompson & Reuter's EndNote Online User Guide is available from the EndNote website
http://endnote.com/if/online-user-manual/x7

The Endnote website:

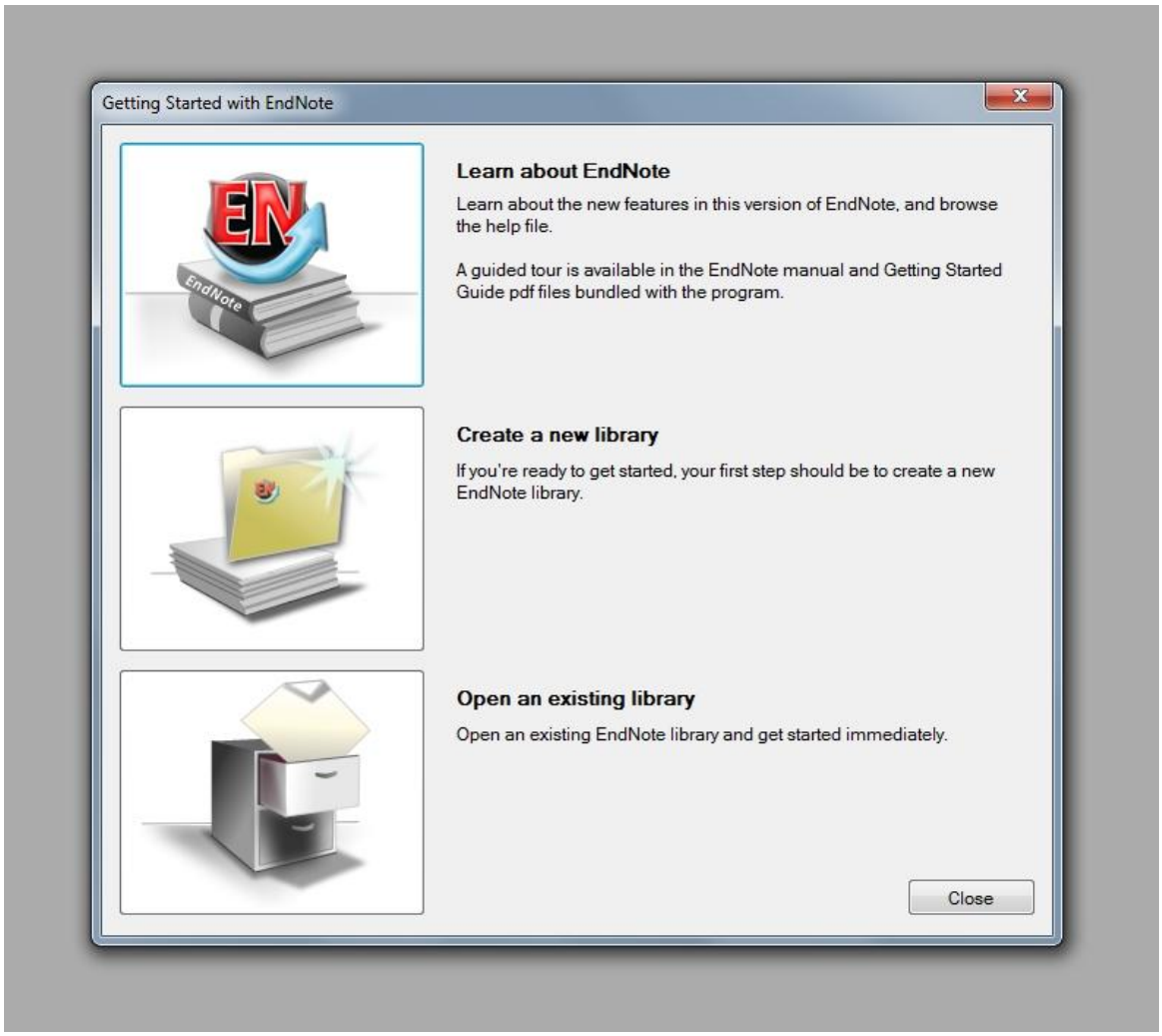
http://www.Endnote.com/
You can download new or updated output styles from this website and view online tutorials.

Part 1 – Creating and Managing your EndNote Library

Getting Started

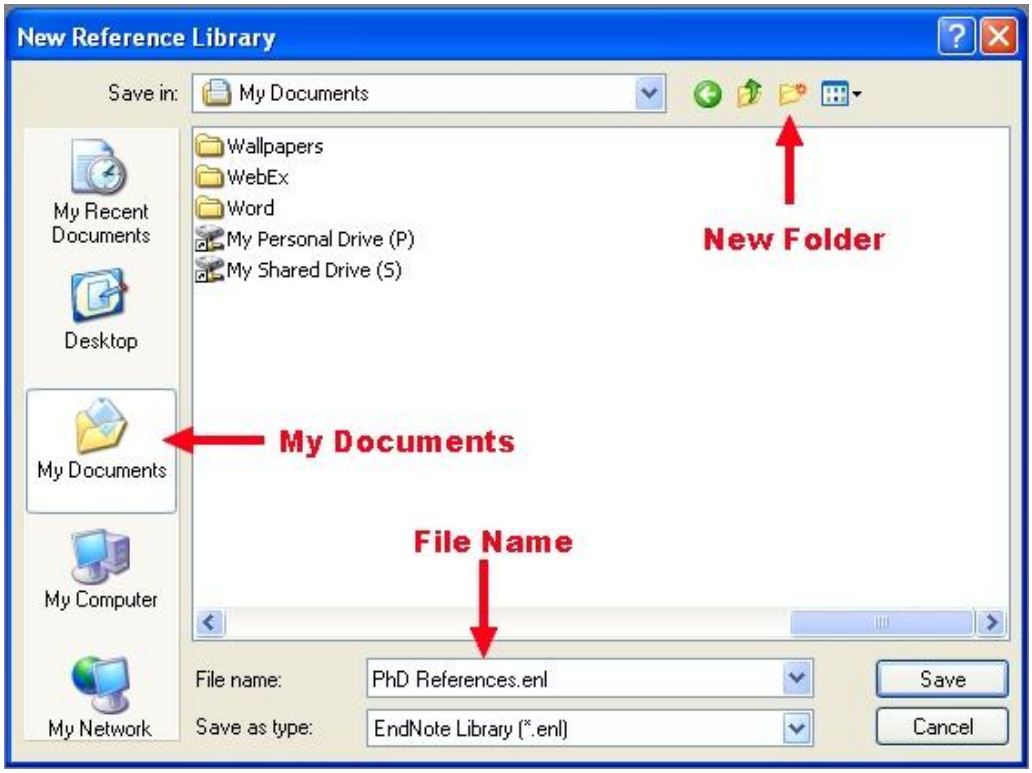
For the purposes of this training, we will create a folder on the c:\drive called 'Research.' We will store our new library, research PDFs and Word documents in that folder.

1. Click on the Start button at the bottom left corner of your screen.
2. Click on *Programs*
3. Click on *EndNote*
4. Choose the *EndNote Program*
5. The first time you use EndNote, a dialog appears prompting you to open a reference library. Select *Create a new library*



This window will not appear again. If you wish to create another new library after you have started using EndNote, click on the File menu, then select 'New'.

1. EndNote presents a window prompting you to name and save the new library. Let's create our new folder in 'My Documents'.
2. Click on the 'Save in:' dropdown menu to see the choice of computer drives.
3. Click on 'My Documents' to select it.
4. Click on the New Folder icon



5. Give the new folder a name, for example 'PhD References', and hit the enter key Double click on the PhD References folder to open it. We will now create our new reference library and save it within the research folder.
6. Click in the File name window.
7. Delete the suggested name if you wish and enter a name for your new library. The extension '.enl' stands for 'EndNote Library'. EndNote will add '.enl' automatically.
8. Click on the Save button.
9. The new library appears as an empty EndNote library.

Build your Library

Downloading References from Electronic Resources.

General tips

Information from electronic resources, such as the Library discovery tool; Primo, and other information databases and Google scholar can all be exported into your EndNote Library.

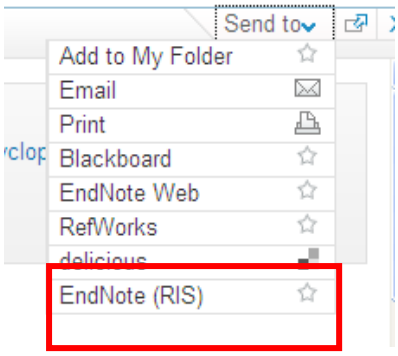
PRIMO Search

Items found using Primo can be exported to EndNote, both individually and as a group. As with all exports it is important to check your references in your EndNote library as some editing may be required.

Individual References

1. **Login** to PRIMO and do your search as normal
2. Open the **Details** tab

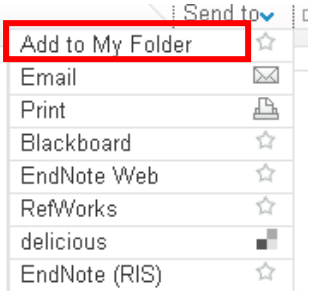
3. Click on the **Send To** tab
4. Choose **RefMan (RIS)**
5. **Import to Citation Manger** box will appear**,** it will default to **UTF-8** , click **Ok**



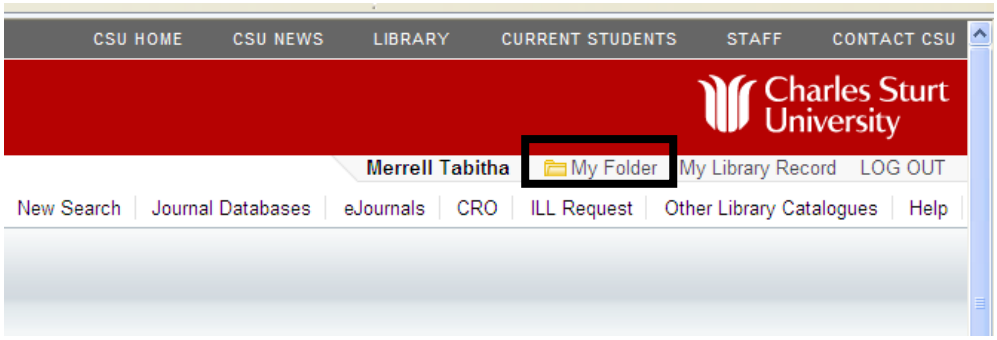
The reference will be added to your most recently opened EndNote Library.

Multiple References

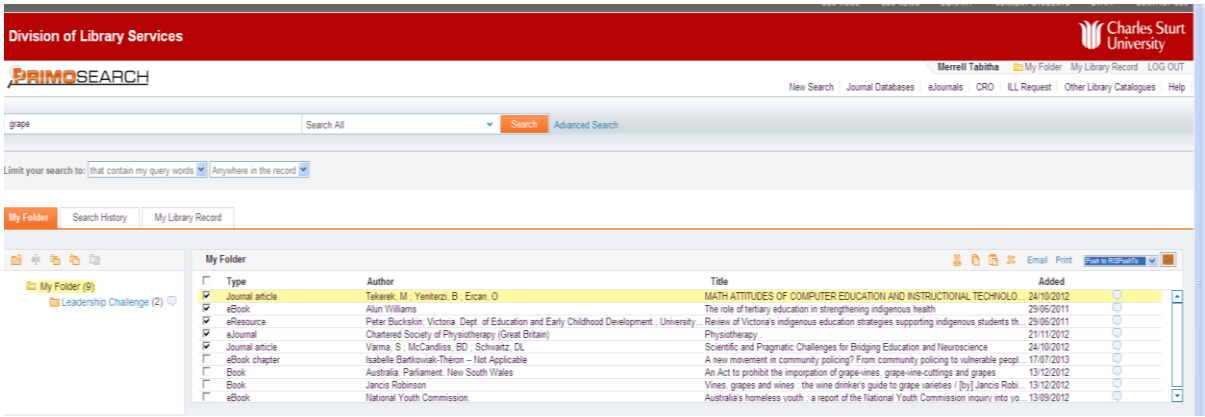
1. **Login** to PRIMO and do your search as normal
2. Choose your references, one at a time and select **Send To** tab and **Add To My Folder**



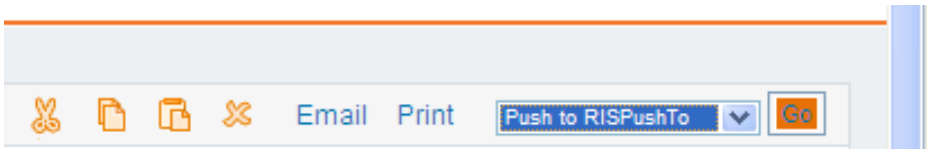
3. Do this for all the references you would like to add to EndNote.
4. In the top right click **My Folder**



5. Select the references you would like to add to EndNote



6. Click on the **Send To** tab
7. Choose **Push to RISPushTo,** click GO



8. **Import to Citation Manger,** it will default to **UTF-8** and click **Ok**
   The references will be added to your most recently opened EndNote Library.

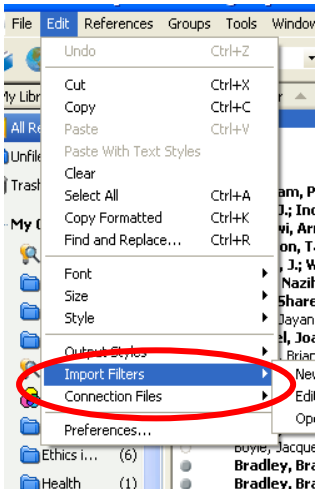
There are a few things to note when using PRIMO to export to EndNote:

- For books – all authors and editors come across into the Author field, so some editing may be required for edited books.
- Corporate Authors – records that include corporate authors can be made to export with the appropriate comma, the normal filter will not include this. If this is something that you regularly export, you can edit the filter, see below for more instructions. Otherwise you can edit the record.
- eBook chapters will come across as eBooks, so some editing may be required.

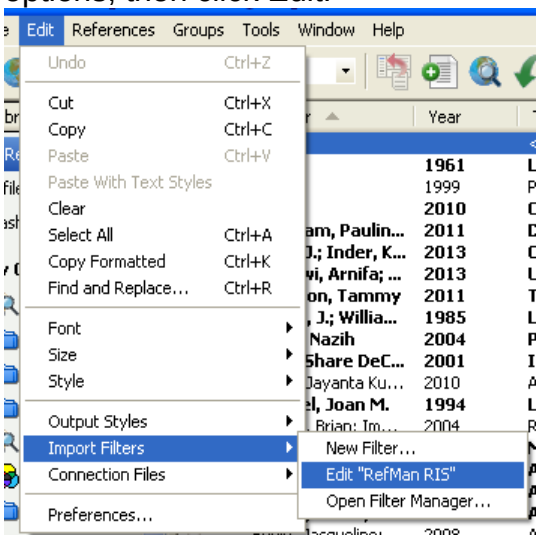
Editing EndNote Filters

To change the import of Corporate Authors to include a comma, you will need to go into the EndNote program.

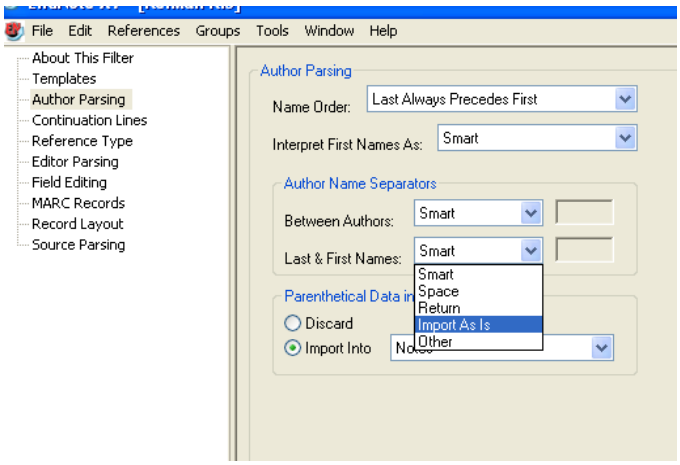
Click Edit, Import Filters



If you have been using the RefMan RIS filter it will be listed and you can click "Edit RefMan RIS" if not, choose New Filter and then choose RefMan RIS from the list of options, then click Edit.



Once you are in the filter, choose the Author Parsing option and under the Last & First Names: click on the drop down menu and change from Smart to Import As Is.



If you have any difficulties, contact a Faculty Liaison Librarian for assistance.

Library databases

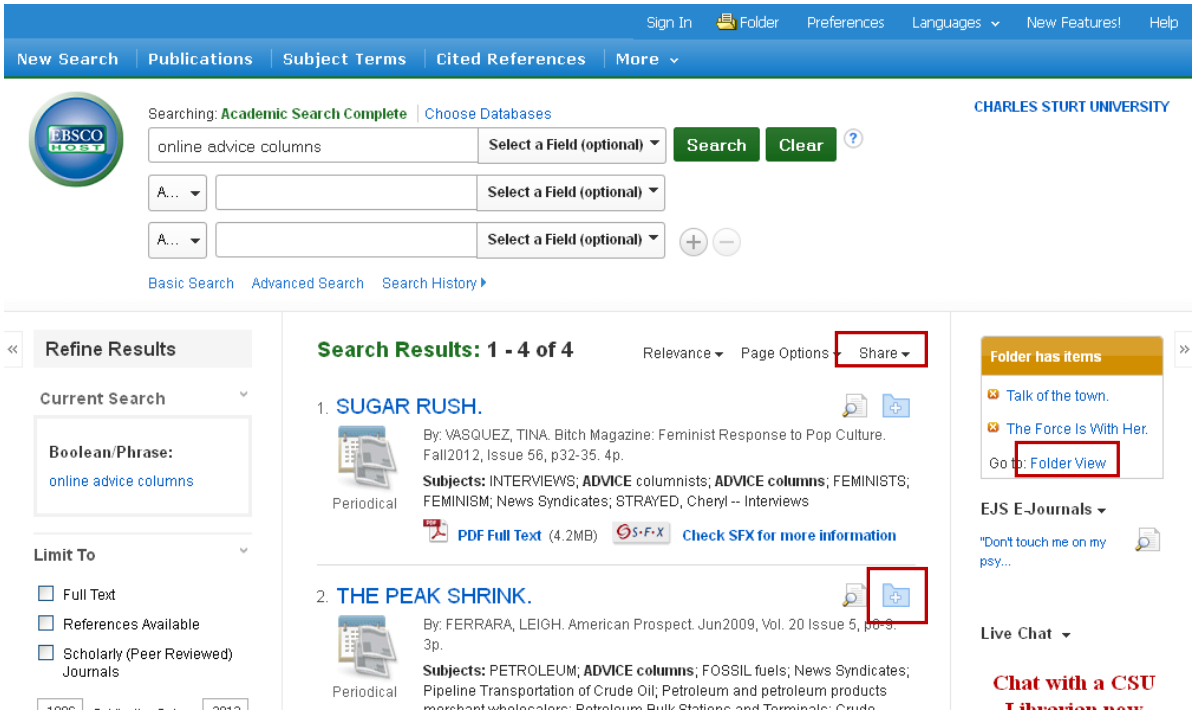
You can search the databases from the CSU library webpage, and then export the search results to EndNote.

This example uses EBSCOhost, however many of the other databases available at CSU will also transfer directly to EndNote. Typically they will have an option to 'mark' or 'add' records of interest. Then you will find an export/download option.

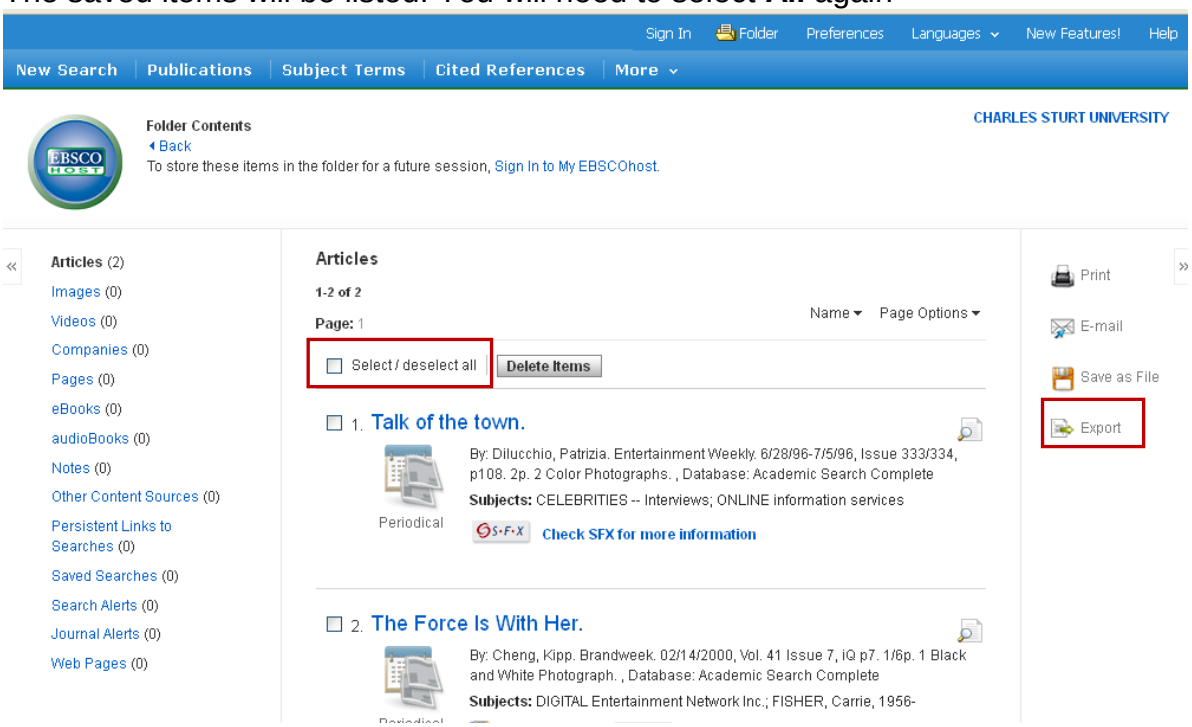
For more detailed instructions using the different databases see http://libguides.csu.edu.au/content.php?pid=414493&sid=3387841

EBSCOhost is set up for direct imports; however, as with all downloads it is a good idea to review your records once they have been added to EndNote.

1. Go to the Library homepage: http://www.csu.edu.au/division/library/
2. Click on **Find Information**
3. Click on **Journal Databases**
4. Under the alphabetical listing click on the link to **EBSCOhost**
5. Click on *Academic Search Complete*
6. Type your search terms for example**: '*online advice columns*'** at the Search prompt
7. Select the **Full Text** option so you can work with attachments later
8. Click on the **Search** button



9. For each useful reference, click on the icon to save your reference to a folder. You can also select a range of references with one click – look for the link to add all of the displayed records at once under Share
10. Go through the pages of results selecting all of the relevant articles.
11. Click on **Folder view** link.
12. The saved items will be listed. You will need to select **All** again



13. Click on the **Export** option.

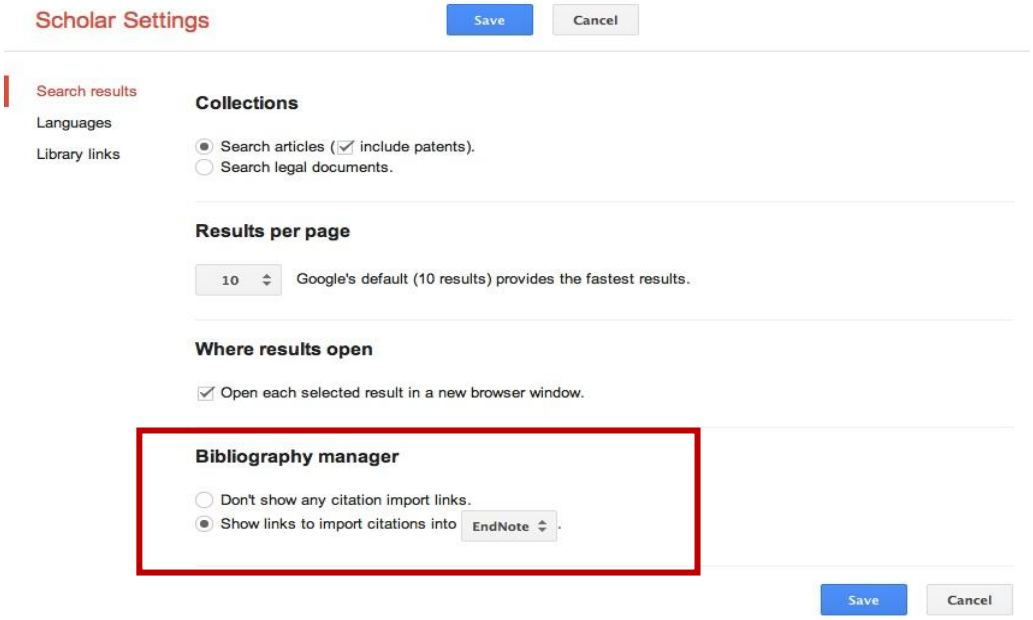
14. EBSCOhost is preset to do a **Direct Export to EndNote, Procite or Reference Manager**
15. Click on **Save**
16. You may be asked to select the program to open this record with, choose EndNote and click on OK
17. The references will by default be transferred directly to your currently open EndNote library.

Google Scholar

To set Google Scholar Settings,

1. Click on the Settings option in the top right of the page.

2. Click on **Bibliography Manager = Show links to import citations into EndNote**, and Save these settings.



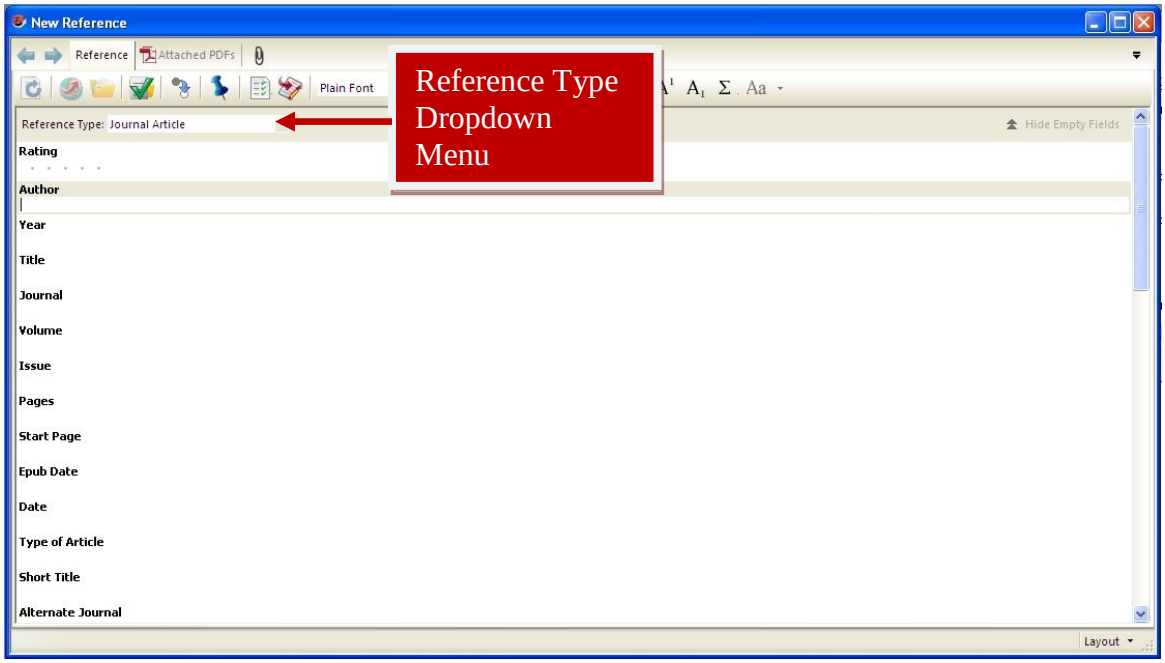
3. Locate required reference in Google Scholar
4. Click Import into EndNote link displayed below each record in *Google Scholar* search results
5. Click Open in the 'File Download' window
6. Choose EndNote destination
7. Click OK

Manually Entering Information Into Your EndNote Library:

Sometimes you will have references that need to be added manually or you may need to modify an imported reference.

Make a new reference in your library by

1. Clicking on the References menu and clicking on New Reference
2. Using the *Ctrl* + *N* short cut or
3. Clicking on the New Reference icon:



The default new record is a Journal article reference type. If you need to create a record for a different type of item, choose a reference type from the dropdown list at the top of the window. If you change the record type, the fields will alter to match the information needed to reference the new type.

Enter bibliographic information into the appropriate fields in the Reference window. You may not need to enter information in all the available fields.

When you are finished, close the reference to save it and add it to the library.

Moving through the reference window:

- Use the scroll bar to look at the fields, which may change according to the needs of the reference type.

- The active field is surrounded by a border. Press the *Tab* key to select the next field in the reference. Press *Shift* + *Tab* to select the previous field.
- 'Next Reference' and 'Previous Reference' buttons at the top of the reference window allow you to browse references in a library.
- Closing a reference: Click on the close box or press *Ctrl* + *W* to close a reference and save any changes.
- Closing multiple references: Hold *Shift* or *Ctrl* while clicking the close button.
- Special bibliographic formatting and punctuation should not be included when you enter reference data into EndNote. For example, you do not need to put quotes around titles, italicise journal names, or include the abbreviation Vol. along with volume numbers. Enter only the data required and leave the formatting to EndNote.

Term lists and Auto suggest:

As you enter new references into your library, EndNote notes any new terms that are typed into the Author, Journal, and Keywords fields. New terms are indicated in red text. EndNote saves these and will auto-suggest them when you enter anything similar, to save you some typing.

Tips for choosing the right reference type

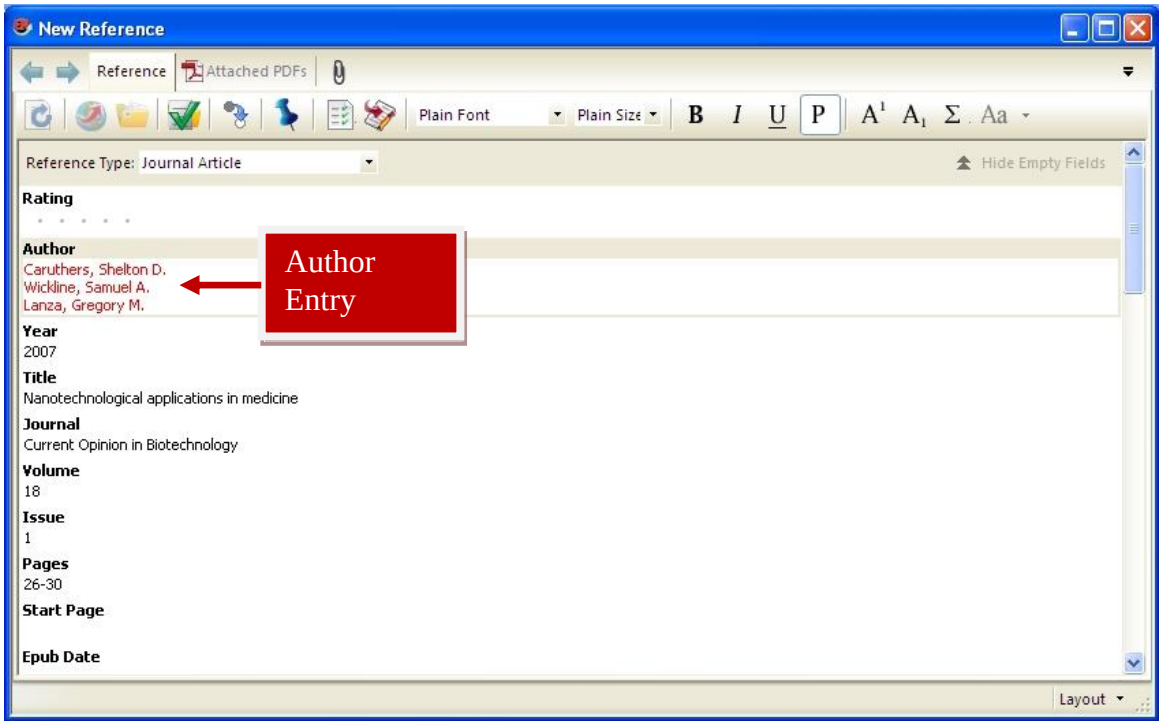
Use **Book**	For books written by one or more authors
Use **Edited Book**	for books edited by one or more editors (whether they are books in a series or not).
Use **Book Section**	For references to parts of edited or non-edited books (a chapter, for example, or one article in published conference proceedings).
Use **Conference Proceedings**	For unpublished proceedings
Use **Conference Paper**	For articles that are published as part of the comprehensive conference proceedings
Use **Journal Article**	For journal articles that appear either online or in print.
Use the **Web Page**	For citing material from a Web page or ftp site.
Use **Personal Communications**	For email discussions
Use **Chart/Table**	if you want to include an image and later insert that image as a table in Microsoft Word (Images in all other reference types will insert into Word as figures, which are listed and numbered separately from tables)

Entering author names

In general, entries with more than one author or editor must be entered *one name per line*. It is best to enter authors in the following order:

<Family name><comma><space><First name><space><middle name or initial>
e.g. Suzer, Max E.

EndNote abbreviates first and middle names if required, so for maximum flexibility enter whole names whenever possible. If you are entering initials, type a period or a space between initials, (for example 'Merrell, T.A.' or 'T A Merrell'), otherwise EndNote interprets the initials as a single name: 'Ta.' If a reference has no author, you should leave the Author field blank. Do not enter 'Anonymous.' EndNote will manage this according to the referencing style you choose.



The table below demonstrates how EndNote will interpret the author data that you enter. The names in **bold** indicate what EndNote will identify as the family name.

Data Entered	EndNote interpretation	Data entered	EndNote Interpretation
Jones, Davey	Davey **Jones**	Zhang, Haiyuan	Haiyuan **Zhang**
Davey Jones	Davey **Jones**	Haiyuan Zhang	Haiyuan **Zhang**
van der Laar, Lianne	Lianne **van der Laar**	Department of Agriculture,	**Department of Agriculture**
Lianne van der Laar	Lianne van der **Laar**	Department of Agriculture	Department of **Agriculture**

TIP!
To ensure organisation names are displayed correctly, add a comma to the end of the entire name, as in the Dept of Agriculture example above

Entering dates

The APA 6th manual states:

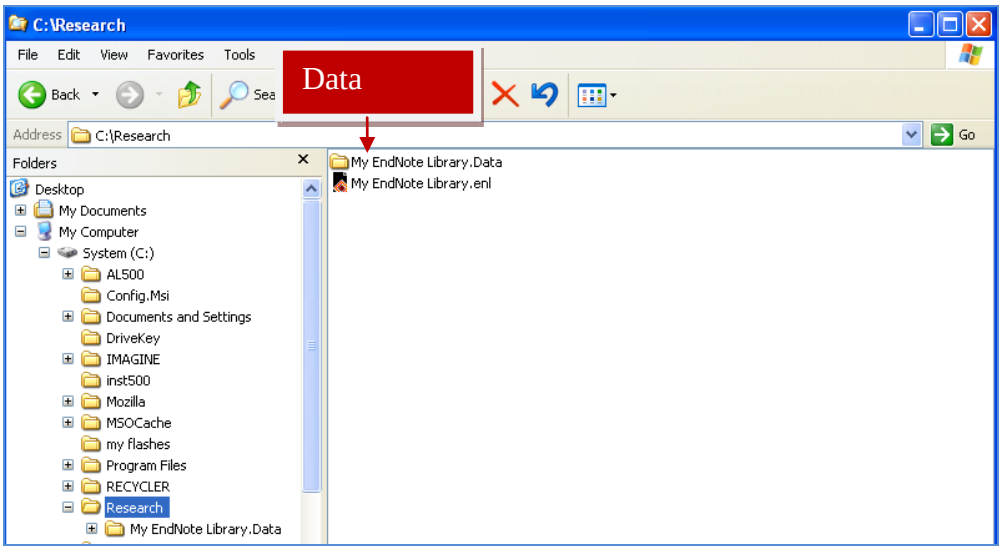
"Do not include retrieval dates unless the source material may change over time (e.g., Wikis)" (American Psychological Association, 2010, p. 192).

If you **DO** still need to enter a date, you can put the date in as:
28th July 2005
28 Jul 05
or 7/28/05
Note: If you want to use numbers only, you MUST put them in using the American style of Month/Date/Year.

Please choose one style and use it consistently, or the citations will look odd in a bibliography.

Adding File Attachments to your EndNote Library

Each EndNote record has a File attachments field. EndNote makes a copy of the original file and places it in the .Data folder that is created with your EndNote database.



You can attach a PDF to a record by

1. Selecting the record in your EndNote Library
2. Clicking on References in the top menu
3. Select File Attachments
4. Select Attach File and then locate the pdf or any file to attach to the record

Alternatively you can drag and drop PDF and other file types into selected records in your EndNote Library. EndNote will always be able to access the file, even when you share your database with a colleague.

To open attached files you can either:

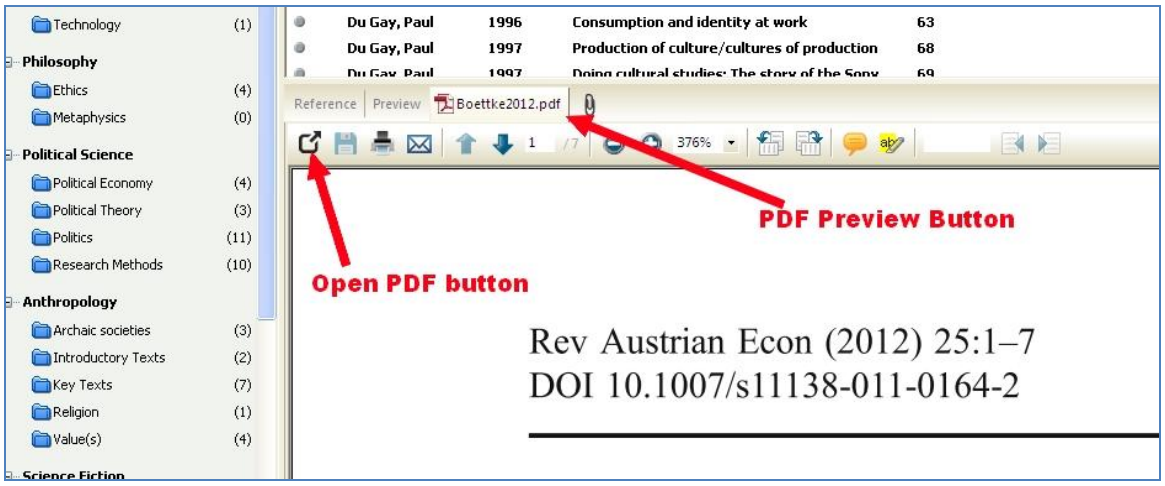
Use the File menu

1. Select the record or hold down the control key to click and select a reference with an attached file.
2. Click on the *References* dropdown menu.
3. Click on *File Attachments*
4. Click on *Open file*

Click on the 'Open File' button in the toolbar:

Or for PDFs use EndNote's native PDF viewer:

1. Click on the PDF icon to view it in the preview pane
2. Click on the 'Open PDF' button to launch the viewer in a separate window



***Note:** If you attach Word or Excel files, please be aware that EndNote makes a copy of the original file and adds it to the DATA folder. Any changes made to the original file will not be saved to the copy in the .Data folder. Do not attach files that you haven't finished modifying.

To manually import a PDF file

1. Open the library into which you want to import the references.
2. From the File menu, choose *Import File*.
3. Click the *Choose* button to locate and open the file you want to import.
4. Select the needed PDF file and click *Open*.
5. Select the *PDF* import option from the Import Option list.
6. Select an option from the *Duplicates* list:
   - *Import All:* Imports all references, including duplicates.
   - *Discard Duplicates:* Imports all references except duplicates.

- *Import into Duplicates Library:* Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

7. Choose a *Text Translation* option. The default value is *No Translation*. There is no need to change this value.
8. Click *Import* to import the file.

Note: When the import is complete, the new record is stored in the Imported References group, and will include bibliographic information given for the Digital Object Identifier (DOI) mined from the PDF file such as title, author, volume, issue, page, year, and DOI. This is a perfect time to add a keyword to the imported reference or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

To manually import from folders containing PDFs

1. Open the library into which you want to import the references.
2. From the File menu, choose *Import* > *Folder*.
3. Click *Choose* then *Browse for folder* > select the required folder, then *OK*
4. If the selected folder has sub-folders, select *Include files in all sub-folders* to include PDF files in those sub-folders.
5. Select the *PDF* import option from the *Import Option* list.
6. Select an option from the *Duplicates* list:
    - *Import All:* Imports all references, including duplicates.
    - *Discard Duplicates:* Imports all references except duplicates.
    - *Import into Duplicates Library:* Duplicate references are imported into a library called File-Dupl.enl, where File is the name of the library into which you are importing. By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library.
7. Click *Import* to import the files in the selected folders.

Importing PDF files and/or folders to create new references

You can convert existing collections of PDF files into EndNote references with minimal typing by extracting Digital Object identifiers (DOI) from PDF files. EndNote matches DOI information, capturing bibliographic content to create new EndNote references.

Note:

1. This function will only work for some PDFs with the DOI number in the document or the document's metadata. It cannot import data from scanned PDFs or PDFs without the DOI.
2. When EndNote is unable to locate the reference data, it will create a blank record with the PDF attached and the file name in the Title field.
3. When imported the PDF is automatically attached to the record.
4. If there are two DOIs found in the first two pages of a PDF document, EndNote will put both DOIs in the DOI field. The PDF is then attached and the file name is put in the Title field.

Auto-import of PDFs and EndNote groups

EndNote allows a range of methods to import PDFs, automatically importing, naming and sorting the records.

Create a designated PDF auto-import folder that EndNote monitors for you

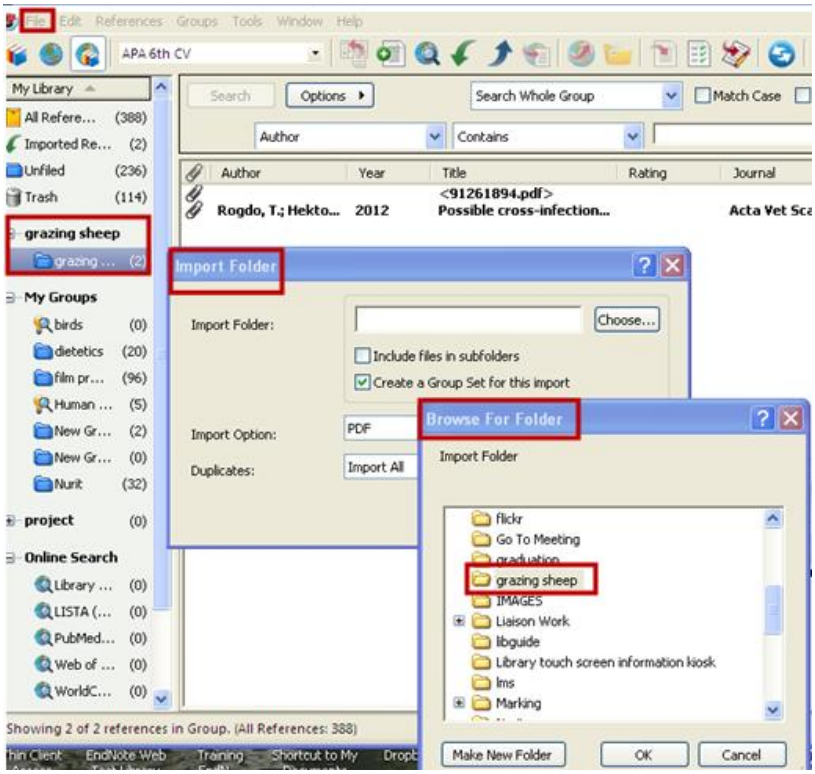
- Use Edit> Preferences>PDF Handling to select the folder.
- EndNote will automatically import from this folder and will attach PDFs to existing records or recently exported records from databases.

Control how PDFs are named within your library when these are imported or dragged and dropped.

- Use Edit>Preferences>PDF Handling> PDF Auto Renaming Options to select naming preferences.

Automatically create group sets and groups when importing folders of PDFs.

- Use File>Import>Folder to import a folder of PDFs.
- EndNote will apply the folder name to the new Group set and Group created with the imported PDFs



Using find Fulltext function to import PDFs

EndNote can locate full text files on the Internet using the data in your EndNote records. You can do this for a single record or up to 250 records at a time.

You must first setup EndNote to authenticate your CSU access

1. Select *Edit > Preferences > Find Full Text*
2. Select the check box to enable *OpenURL*
3. Replace the existing text in the *OpenURL Path* with: ***http://sfx.unilinc.edu.au:/csu***
4. Replace the text in the *Authenticate with: URL:* ***http://ezproxy.csu.edu.au/login?url=***

5. Click *OK*

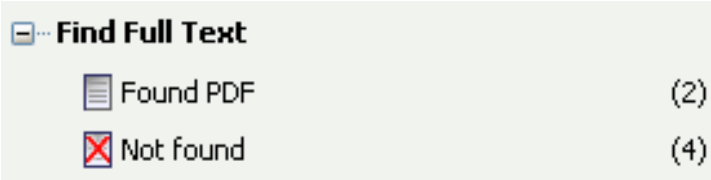
From here there are two methods you can use to locate full text.

Using the DOI in the record to find full text

This will automatically attach the full text, if found, to your EndNote record

1. Select the required record(s)
2. Select *References > Find Full Text > Find Full Text*

EndNote provides a progress indicator at the bottom of the Library column



Linking to the record in the Library's databases to download the PDF

Locating full text copies of journal articles listed in your EndNote library:

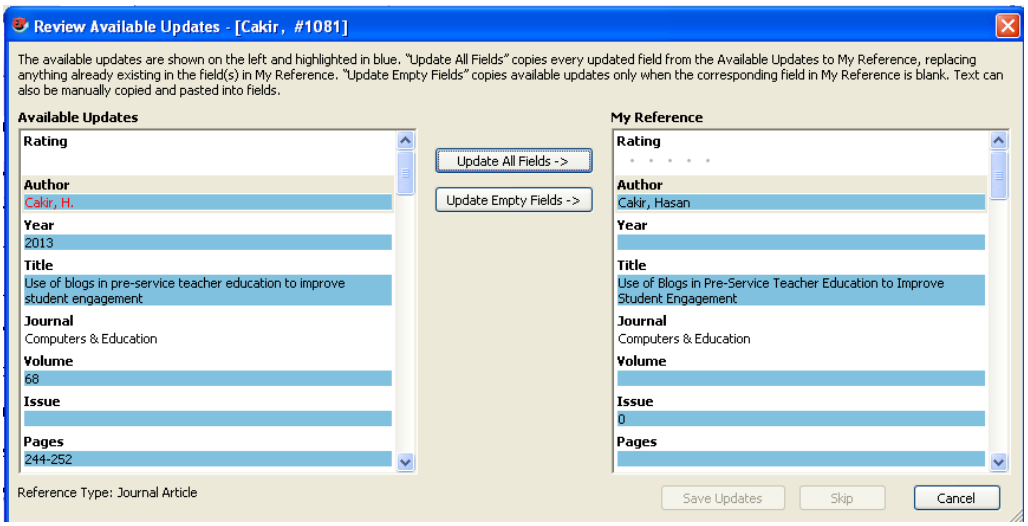
1. Select the required record(s)
2. Select *References > URL > OpenURL Link*

Off-campus users will be prompted for a current CSU username and password; be presented with a list of SFX services and prompted to click *Continue*.

Updating References with Missing Content

Sometimes, imported references will come into your library with vital sections of the reference missing. For example, a journal article may be imported without the Volume, Issue and page numbers entered. EndNote can often populate the reference with a click of a button

1. Find the reference in your Library that has missing details
2. Double click on the reference to open the Reference in a new window
3. Click on the Find References Update button at the top right of the reference
4. You'll be shown a possible record (on the left) that matches your existing record (on the right)



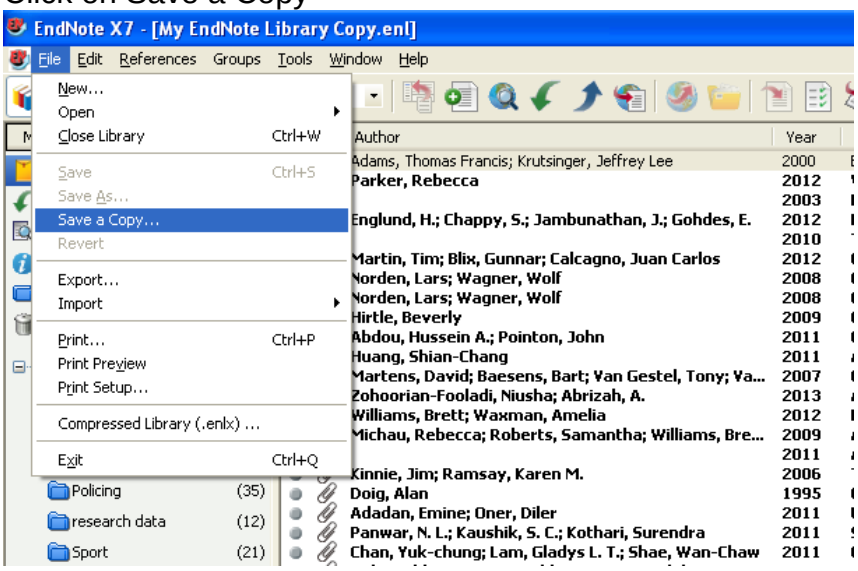
5. You can choose to Update all fields, or Update empty fields
6. You can also manually copy & paste text from the potential record into your existing record in this window
7. When you're happy, click on Save Updates

Regular Backups

We recommend that you back up your EndNote library and directories of research materials regularly, to a source other than your computer's hard drive.

To create a copy of your Library

1. Click on File
2. Click on Save a Copy



3. EndNote will then ask you where you want to save the copy. It will also include the word "copy" into the name of the file.
4. Click on Save

TIP!
Any subsequent times you backup your library, replace the existing copy in your backup location, this will reduce the confusion of multiple copies of EndNote libraries in the future.

Looking At Your Library

When you have transferred your records, you see the **Library window.** The newly imported references are displayed.

The menu bar:

> The **File** dropdown menu allows you to open, close, save and create EndNote libraries.

> The **Edit** menu:
  - Cut, copy and select references.
  - Define the output styles that format the display of references.
  - The Preferences option allows you to configure the software to your needs.

> The **References** menu:
  - create, edit and delete references
  - custom sort references
  - You can also work with URLs (online files) and file attachments

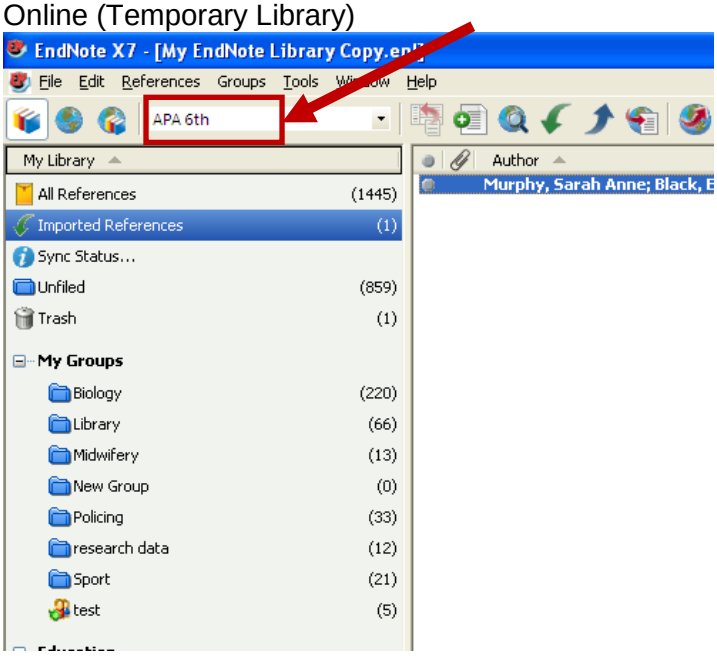
> The **Groups** menu:
  - create groups, smart groups or group sets
  - add references to groups
  - hide groups

Display Modes and Layout Options

Display modes

Depending on the mode chosen, the panel either hides or shows particular Groups. Users choose the active mode by selecting one of the three new toolbar controls:

- Local
- Integrated
- Online (Temporary Library)



These toolbar icons remain depressed when clicked, indicating the current mode. The leftmost button is for Local mode, the middle is for Online mode, and the rightmost is for Integrated mode.

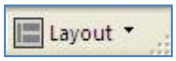
The default mode when EndNote is installed is Integrated. However if the user then selects one of the other modes, EndNote will remember that choice when it is shut down, and it will reopen in Local mode. Library windows never open directly in Online mode.

Local mode hides the online groups and displays only those groups containing references found in the user's library.

Online mode presents only the Online Search groups, in addition to the Online References and Online Trash auto-groups. All the references found in these groups are located in a temporary database, separate from the user's library, but displayed in the normal library window. In Online mode, users can search and download references from remote databases without affecting their own library. To copy any required references to their permanent library they must select those references and use the *References* > *Copy References To* command.

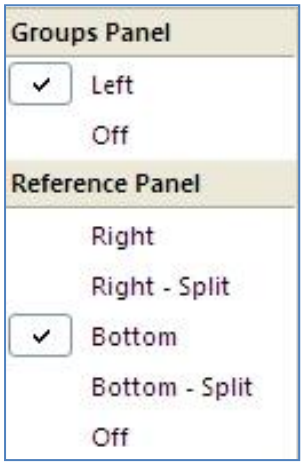
In the *Integrated* mode, all groups appear in the Groups Pane, including the Online Search groups. When performing an online search, results are downloaded directly into the user's library and added to the All References group (i.e. the complete EndNote library).

Layout options

EndNote allows you to change the layout of your library and reposition the various panels in EndNote to suit your taste. To change the layout of your library you need to click on the 'Layout' button at the bottom right of your EndNote screen: 

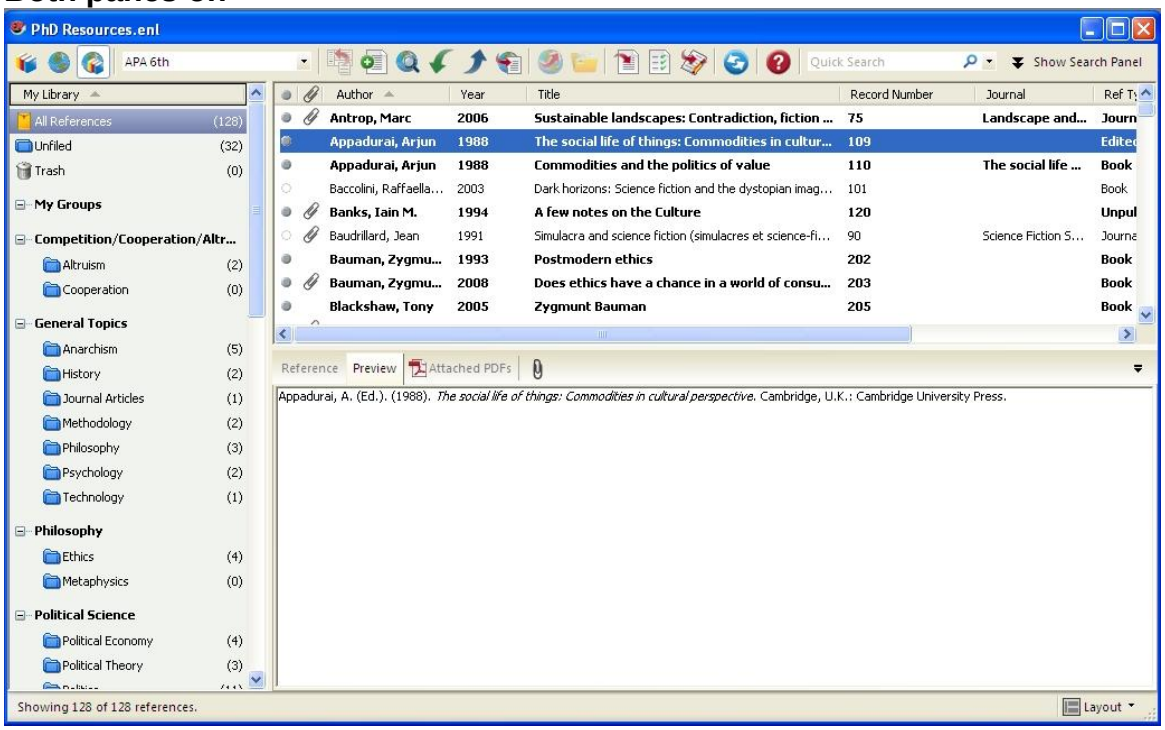
With the layout button you can:

1. Turn the Groups pane on/off
2. Turn the Tab pane on/off
3. Change the layout of the Tab pane to:
    a. The right
    b. The right, split in two, with attached PDFs displayed in the second window
    c. The bottom
    d. The bottom, split in two, with attached PDFs displayed in the second window

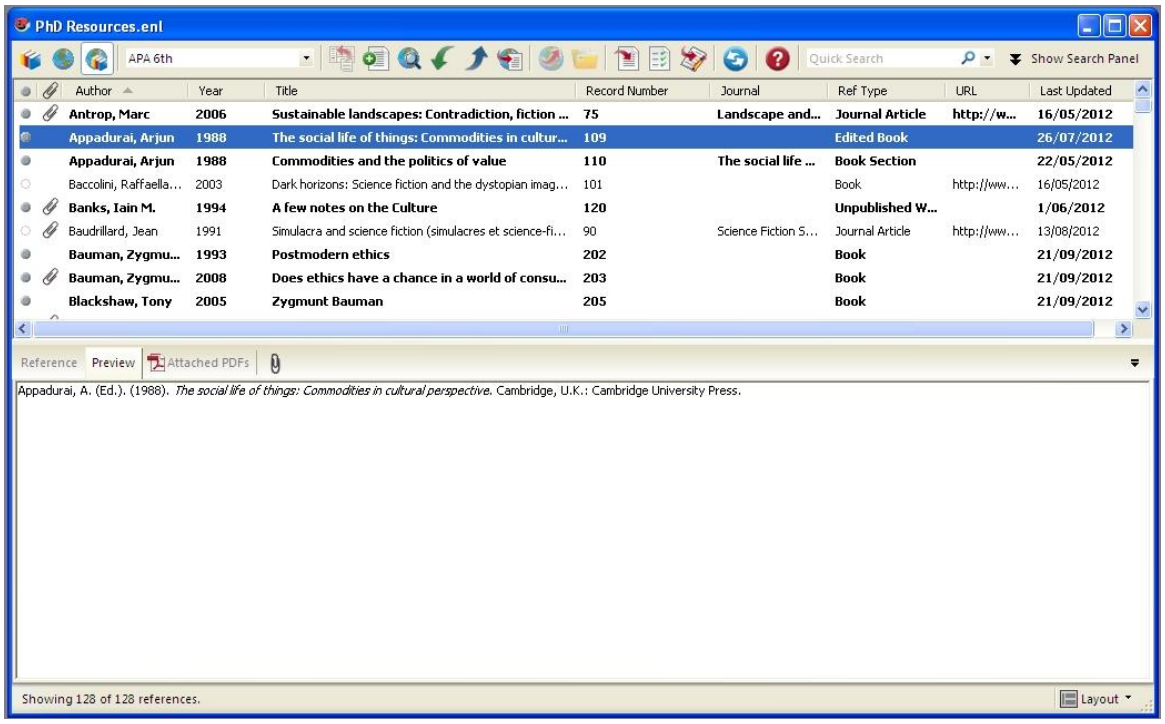


Examples of layout views

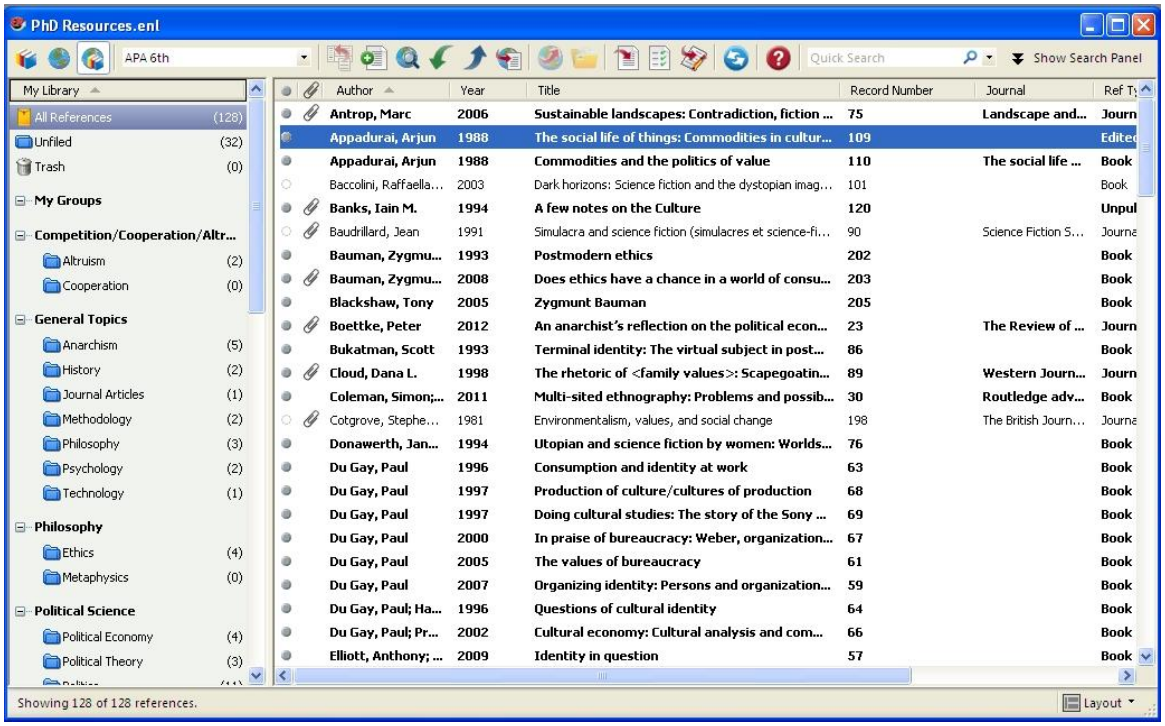
Both panes on



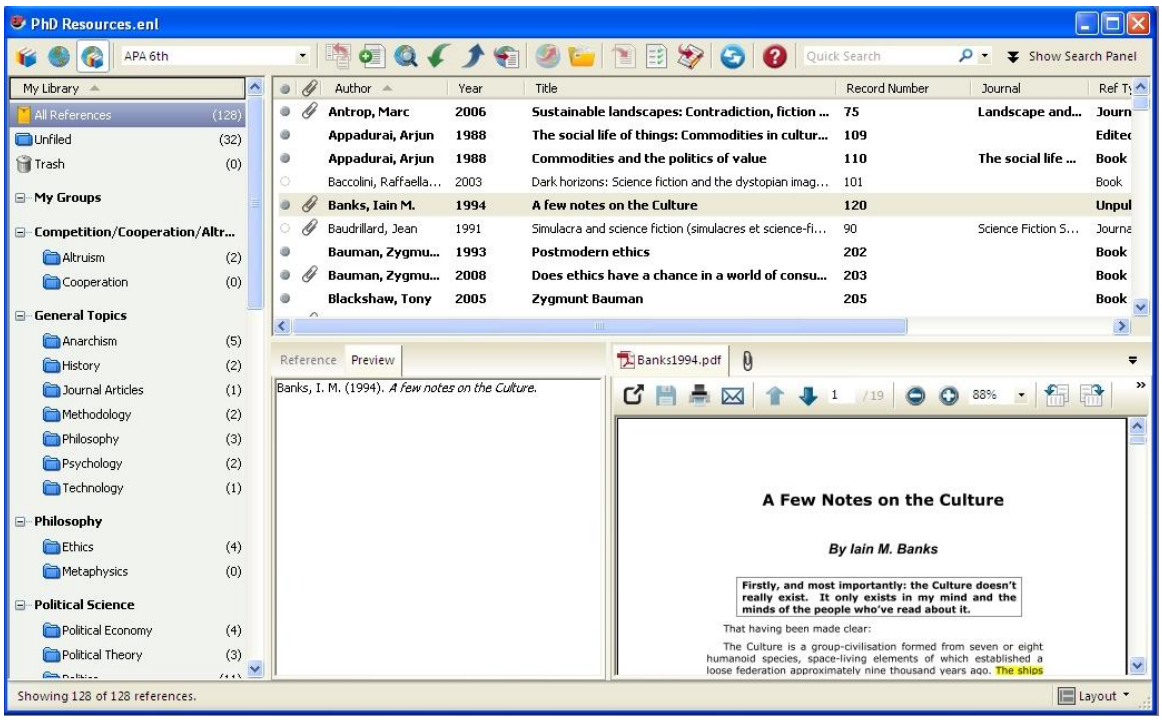
The Groups pane off



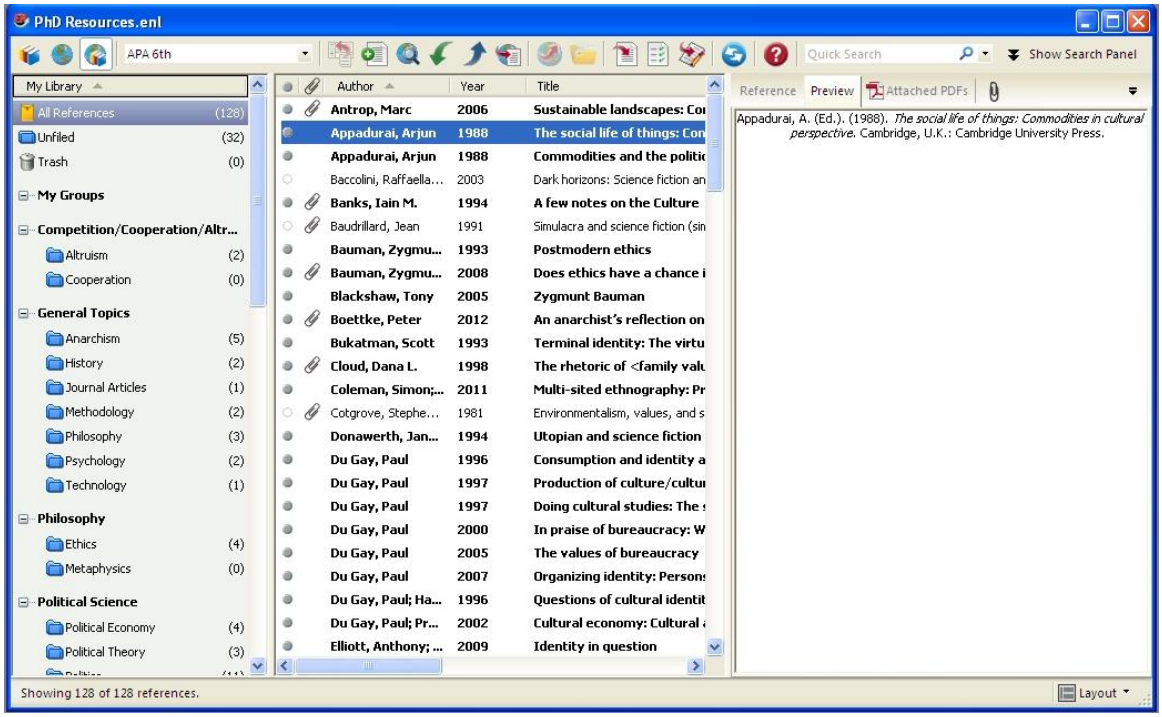
The Tab pane off



The Tab pane on the bottom, split



The Tab pane on the right



Selecting and Opening a Reference

If you want to work with a reference or view it in the preview pane, you must first select it. You can then view its contents, copy, cut, delete, or edit it.
To select a record, you can:

- Click on the reference using the mouse
- Use the arrow keys
- Type the first few letters of the field by which the library has been sorted.

You can then double click on the selected record to open it or drag the selected item to a group, or add a PDF.

You may need to edit some of the fields when importing a reference. Typical transfer issues include:

- Title field: all titles in all capital letters, or coding instead of punctuation.
- Reference type: may show 'Generic' instead of a Newspaper or Journal article. It won't look right in your bibliography.
- Keywords: you may need to press the *Enter* key after each keyword to put them on separate lines, so that EndNote will recognise each separate keyword.

At this stage you can also:

- Check the notes field and delete any information you do not require.
- Manually add useful information such as the viewing date, database name and vendor
- Drag any new records to relevant groups. (p.)

- Download your PDFs and drag them to the relevant records (p.16)

Close a record by using the *Ctrl + W* shortcut, or by clicking on the Close button in the right corner of the grey toolbar.

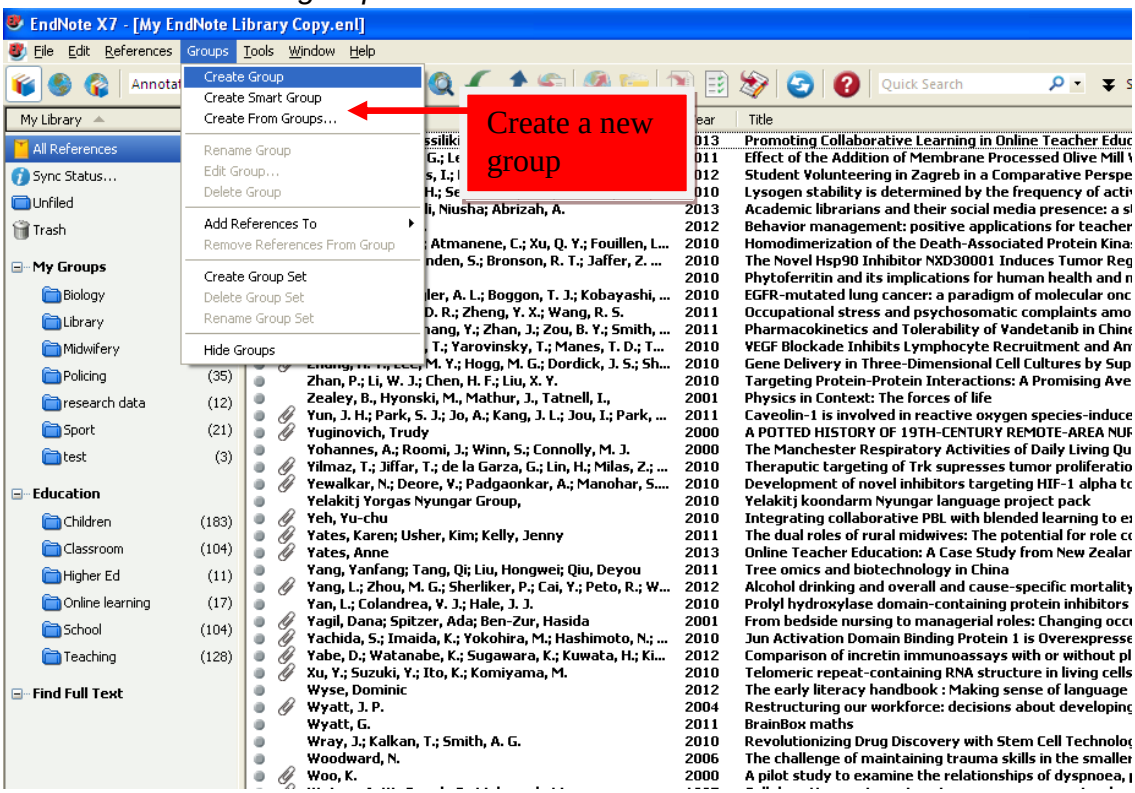
To go back to showing all the references, click on 'All references' in the Groups window.

Creating Groups, Groups from Groups, and Group Sets

The Groups feature makes it easy to break a large library into subsets for later viewing. Groups and group sets simply point to a subset of references that already exist in the library. Groups are created by you to help organize the library.

Creating a new group

1. Click on the Groups drop down menu.
2. Click on *Groups*
3. Click on *Create new group*



4. This will create a new Group under the My Groups in the My Library Panel in EndNote. You can name it now, or rename it in the future by right clicking on the group and selecting Rename Group
5. To add records to your Group, click on All References, select the reference you want to file in your Groups and drag it to the appropriate group folder. You can also use the Control button to select and drag several references at once.
6. To view the records in a group, click on the group name to see which references have been added.

You can add a reference to a particular group only once. However, you can add that reference to any number of groups.

Note: There is no obvious change when you have added the reference to the group, except for the number that appears next to the group.

Deleting a reference from a custom group does not delete it from the library. It removes the reference from the group subset, but the reference still exists in the library.

Deleting a reference from a library also deletes it from all groups in that library.

EndNote automatically generates a permanent group for *All References*, and temporary groups for *Search Results*, any *Unfiled* references (references that have not been added to a group) and *Trash*.

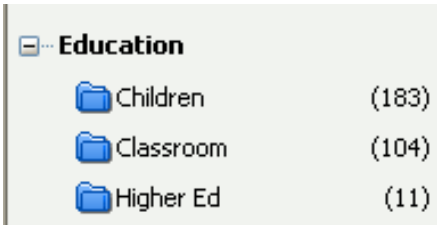
TIP!

Create a group to collect any imported items that you do not currently have in print or electronic full text in your research collection. This will make it easier to identify items that need to be obtained.

Creating group sets

You can organise your groups into larger sets using Group Sets

1. Create your groups first as per normal
2. Create and name your Group Set
3. Drag the groups you want to include into your Group Set, which appears in alphabetical order under the 'My Groups' area.
4. The groups you include will disappear from the 'My Groups' area and will now be listed under the Group Set
5. In the example below, a Group Set has been created called 'Education' and the groups 'Children', 'Classroom' and 'Higher Ed' have been dragged into it:



Creating groups from groups

You can create a new group from any combination of two or more existing groups. This is one method of creating more complex groupings with subgroups. This can also be used to create a new group from the overlap of two or more groups. Finally, you can use this option to create a new group based on one group, minus the references that are held in common with another group.

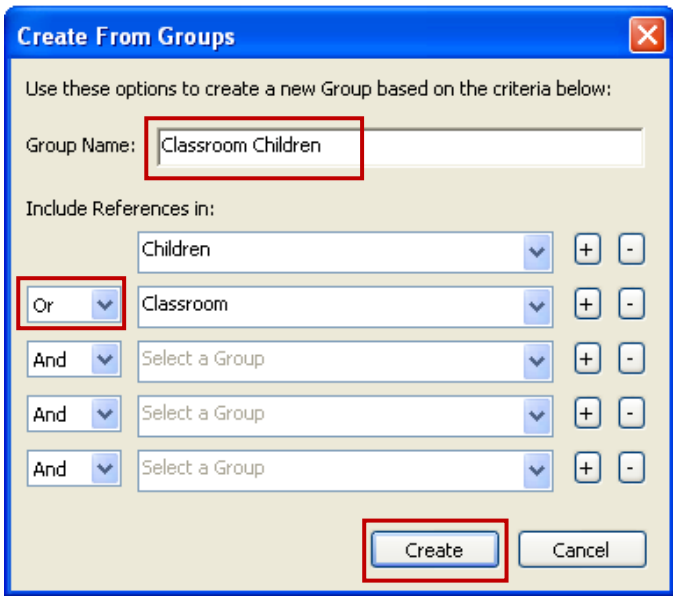
To do this, EndNote uses the Boolean operators, AND, OR and NOT.

1. The AND operator will create a new group based on the records that are common to each existing group selected (only those records that are common to both).
2. Groups created using the OR modifier will include all of the references in each group selected.

3. Groups created using the NOT modifier will include references from one group minus any references that are held in common with another group.

For example, to create a group that includes all of the references in two or more groups:

1. Right-click in the Groups area and select 'Create from Groups…'
2. Give the new group a name
3. Select the first group you want to include
4. Select OR as the operator to combine the groups
5. Select the other groups you would like to include
6. Click on the 'Create' button

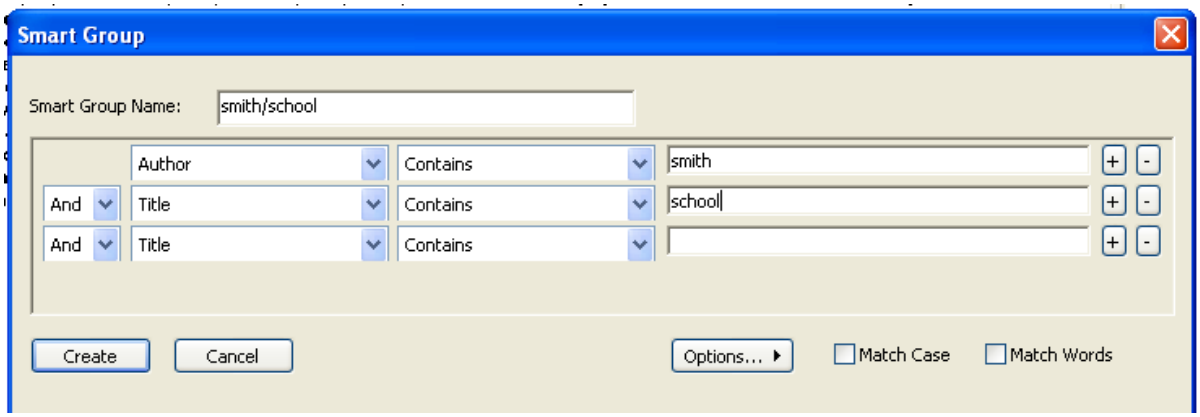


7. The new group will appear in alphabetical order in your 'My Groups' area with a different symbol next to it consisting of overlapping circles of various colours:

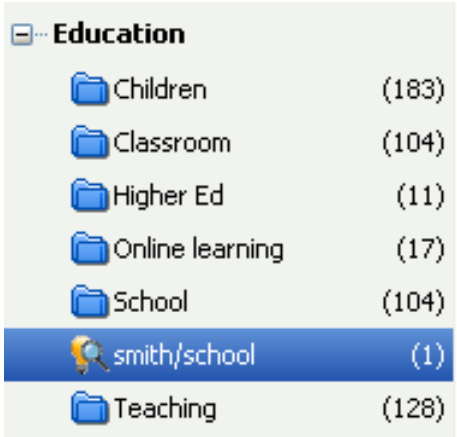
Smart groups

Smart groups are built with search strategies that you wish to run in the background. If you have set up a Smart Group, any subsequent records you import into your Library will be added to the Smart Group if they meet the search criteria.

1. Click on the *Groups* dropdown menu
2. Click on *Create Smart Group* to set up your custom search strategy
3. You can search for authors, keywords, appearance in any field, date ranges or other requirements.



4. Click on *Create*. This will create the new group and find any relevant references already in your library. When you add more references to the library, the smart group will collect any that match your search strategy.
5. The new group is listed in the Smart Groups pane with the name you have specified. Click to select it.



Working with your PDFs in EndNote

EndNote allows you to view, search, annotate and highlight PDF files that are linked to your EndNote library.

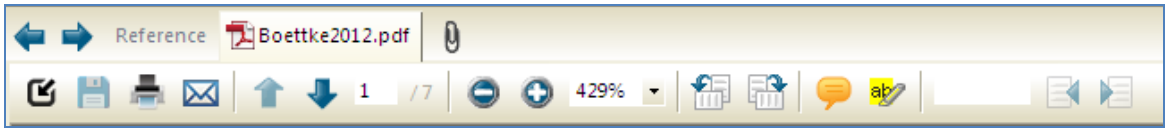
Viewing PDFs in EndNote

To open a PDF in EndNote, simply click on the Open PDF icon on the PDF preview tool bar.

Highlighting and annotating PDFs with EndNote's PDF viewer

These functions can all be achieved by using the icons on the PDF View toolbar

The PDF toolbar



To add a note to a PDF, place your cursor at the appropriate spot in the document and click on the 'Sticky Note' button:

Type your note into the sticky note window. To close the sticky note, simply click on the small x at the top right.

To highlight part of the PDF, select the sections of text that you wish to highlight (*please note – only text based PDFs can be highlighted, not scanned documents).

Then click on the 'Highlight Text' button:

Searching within attached PDFs

To use this feature, the attached files must be text-based PDFs, not scanned documents. EndNote automatically searches the text in attached PDF files when the Quick search box is used. You can choose to restrict your search to only the attached PDF files by using the fields in the Search Panel.

To search all PDF files attached to your references:

1. Open the Search Panel in EndNote
2. Select *PDF* from the Field list to restrict your search to just PDF files
3. Enter the search term(s) that you want to locate. For example, you can enter a single term or a phrase
4. Hit Enter on your keyboard
5. The search results will show in the pane below

TIP!

By default, EndNote ignores capitalization when searching for text. For example, a search for the text *hospital* also finds *Hospital*. If you enter a phrase, EndNote will retrieve references that contain either term. For example, the query *hospital care* retrieves references in which the term *hospital* and/or *care* appears anywhere in the PDF file. To search for an exact phrase, enclose the phrase in quotation marks. For example, the query "hospital care" will retrieve records that contain this exact phrase.

To search PDF Notes on PDFs attached to your references

1. Open the Search Panel in EndNote
2. Select PDF Notes from the Field list to restrict your search to the PDF Notes
3. Enter the search term(s) that you want to locate. For example, you can enter a single term or a phrase
4. Hit Enter on your keyboard
5. The search results will display in the pane below

To search within a specific PDF

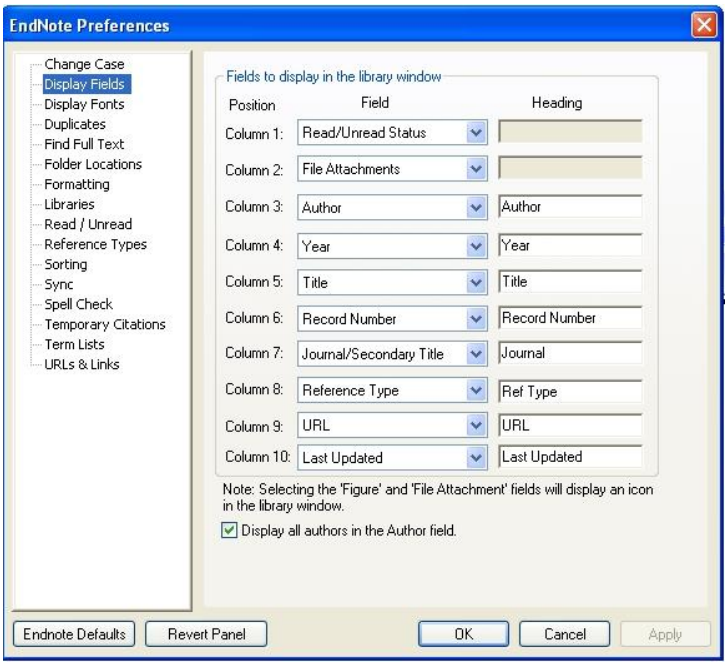
1. Open the PDF in EndNote's PDF viewer
2. Enter the search term(s) in the Search box on the right hand side of the PDF Viewer Toolbar
3. Hit Enter on your keyboard
4. To move to the next occurrence of your search term, click on the arrows to the right of the search box

Using EndNote's Record Numbers to File Printed Documents

By default, EndNote displays ten columns of information about each record:

- Whether a citation has been opened and read
- a paperclip symbol indicating a file attached to the record
- the first author's name
- publication year
- title
- record number
- journal
- reference type
- URL
- Last updated

If you have extensive collections of printed documents, you may want to file them by EndNote record number for easy access – sorting the column by this will display them in the order they were created in your EndNote Library. You will therefore need the record number to be displayed in the summary screen if it is not already.



1. Click on the *Edit* dropdown menu
2. Click on *Preferences*
3. Click on *Display Fields,* from the list on the left side of the preferences window
4. We recommend you change column 6 or 8, whichever you are least likely to need. Click on the dropdown menu for that column
5. Scroll up and select *Record Number* from the list of fields
6. You can rename the heading on any column by typing your preferred words into the Heading text box. Change the header to 'Record Number'
7. If you wish to display fewer columns, you can change the unwanted columns to *unused*

8. Click on *OK* to save your changes, or the *EndNote Defaults* button to reset the display to the original settings
9. Click on your preferred column to sort the order
10. Once you have set the desired display fields, you can adjust the column widths by dragging the bar between column headings.

Part 2 – Using EndNote When You Write

Using EndNote with Word (Cite While You Write)

When you have some records in your library, Word and EndNote can work together so that you can create a Word document with correctly formatted citations and a bibliography. You will be able to concentrate on writing your essay or thesis, with the knowledge that EndNote will handle the correct punctuation and formatting of your references using the referencing style you have selected.

When the programs are working together, you will be able to create a correctly formatted document with in-text citations and a bibliography, such as in the following example.

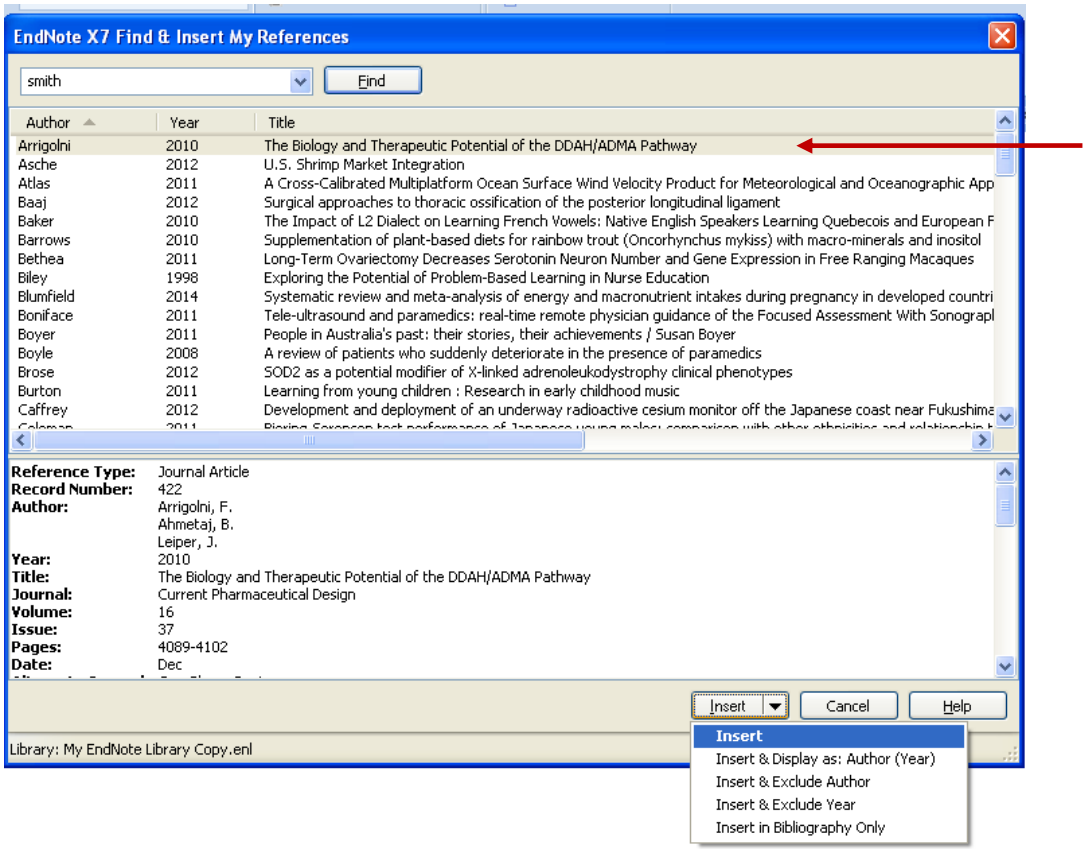
> The high rate of marriage breakdowns in Australia results in personal, family and community consequences and costs. Bender and Fuller's research (1994) confirmed stable and satisfying marriages contribute to men's and women's improved physical and psychological health, their financial condition and children's wellbeing. However, these protective benefits of marriage occur only in families where there aren't major conflicts or mental health problems in a spouse (Australian Bureau of Statistics 2005; Relationships Australia 2003). Among the most frequently asked questions are: Why do marriages break down? What are the reasons for divorce? How can extended family relationships be maintained in the event of divorce?
>
> Australian Bureau of Statistics 2005, *Divorces, Australia (data cube),* cat. no. 3307.0.55.001, ABS. Viewed 26th January 2008, http://www.abs.gov.au/AUSSTATS/
> Bender, W N & Fuller, L 1994 'Victimization of non-custodial parents, grandparents, and children', *Journal of Divorce & Remarriage*, vol. 21, no. 3, pp. 81-114.
> Relationships Australia 2003, *The Rest: Mental Health*, viewed 21st January 2008, http://www.relationships.com.au/what-we-do/policy-research/the-rest-relationships-statistics/.

When you install EndNote onto your computer, it automatically adds the necessary EndNote tab to the toolbar in your Word software.

Inserting Citations into the Text

1. Open the EndNote library or libraries that contain the references you wish to cite. For the example and exercise below, we will use our new library.
2. Start Microsoft Word 2007/2010.
3. Open a new document.
4. Type in the following sentence. '*People need to be aware of the benefits, as well as the risks and possible dangers associated with nanotechnology',* including a space after the word ' … nanotechnology '
5. Click on the *EndNote* tab of the tools ribbon.
6. Click on *Insert Citation* and select *Find Citation*

7. EndNote displays a Find Citation(s) dialog window.
8. Type an author's last name, keyword or year into the 'Search for' box. For this example, type the word "*smith*"
9. Click on **Find**



Note: The first time that you insert a citation in a document the program may appear to 'hang'. This problem does not occur for all users, and there is no progress indicator to suggest that the computer is busy. Subsequent citations will be inserted almost instantly.

10. EndNote compares the identifying text to your EndNote references and lists the matching references. When multiple references match the search, they are listed so you can identify, highlight, and insert the appropriate reference.
11. Click on the required reference to select it.
12. Several papers might be relevant for an in-text citation, if this is the case, hold down the *Ctrl* key and select all the references you wish to cite.
13. Click on *Insert.* A single reference will be inserted into the text within its own bracket; multiple references will be inserted into a bracket, sorted according to your chosen output style, which will be discussed later. Notice that you can choose to omit parts of the in-text citation at this point or have the author name appear outside the brackets (see image above).

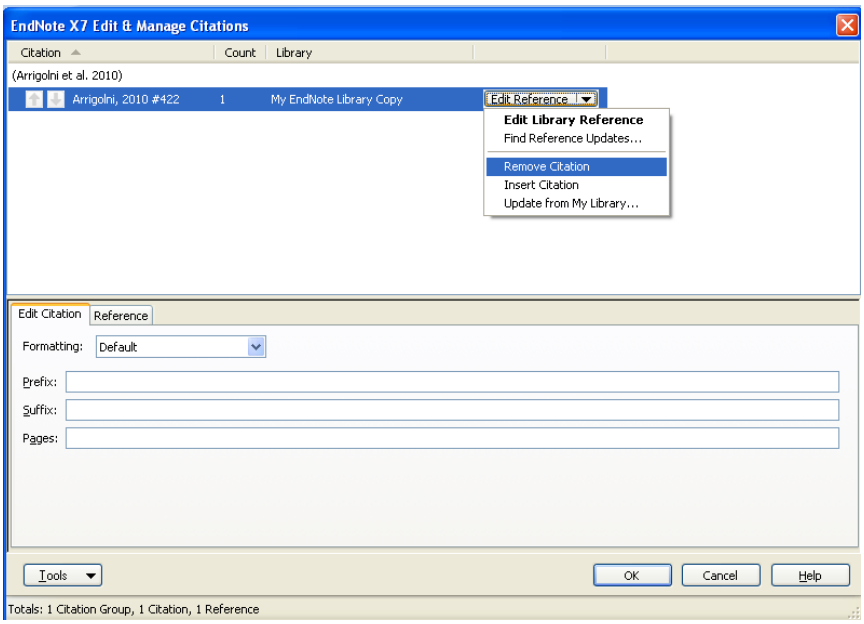
14. When the in-text reference is generated, the item will be added to the Reference list at the end of the paper in an order specified by your output style.

Removing Citations – Very Important!

DO NOT delete unwanted citations by highlighting them and pressing the delete key. While doing so does remove the unwanted citation's text, it may leave the entry in your list of references and more importantly, some of the 'hidden' coding that allows EndNote and Word to work together. This orphaned code can cause problems later, including citations appearing out of order, and can be hard to correct.

If you wish to remove a citation completely :

1. Click on the citation you wish to remove
2. Click on *Edit & manage citation(s)* in the EndNote toolbar**.**
3. The *Edit citation* dialogue box will be displayed. All the citations within the document will be listed on the left portion of the screen. Make sure the citation you want to delete is highlighted.
4. Click on the *Edit Reference* drop down list (see image below).
5. Click on *OK***.**



Adding Text and Pagination

You may wish to modify citations to add pagination details, 'see also' references, or remove the author from the citation bracket.

To hide the author or publication year of a single citation:

1. Right click on the in-text citation. A dropdown menu will appear
2. Click on *Edit Citation*
3. Make the required changes

To customise a formatted citation by adding a prefix, suffix or page numbers, or to modify several citations:

1. Right click on the citation. A dropdown menu will appear.

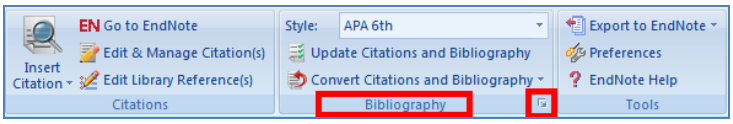
2. Click on *Edit Citation*
3. Click on *More*
4. The *Edit Citation* dialogue box will be displayed. All the citations within the document will be listed on the top portion of the screen. Make sure the citation you want to customise is highlighted
5. In the bottom section of the screen, you can add a prefix, suffix or page numbers (remember to add a space at the end of your prefix and at the beginning of your suffix)
6. Click on *OK* to implement the change.

Formatting a Bibliography(created with EndNote) in Word

Line spacing

Theses often require the references to be double spaced. There is no need to change the output style. You can make this change while formatting your bibliography.

1. Open your Word document:
2. Click on the *EndNote* tab to access the EndNote tools
3. Click on the arrow next to *Bibliography* to access the *Format Bibliography* fly out menu



4. Click on the *Layout* tab
5. In the box labelled 'Line spacing' select the option 'Double'
6. Click on the *OK* button
7. Select the *Layout Tab*
8. Select Double line spacing

Hanging indent

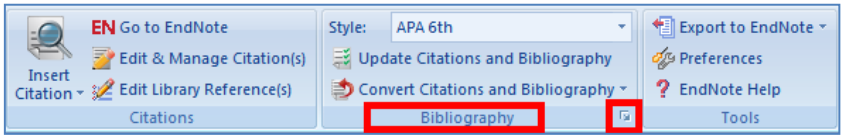
Some referencing styles will format the Reference List with a Hanging Indent (see below)

Asche, F., Bennear, L. S., Oglend, A. and Smith, M. D. (2012), 'U.S. Shrimp Market Integration'. *Marine Resource Economics,* 27/2: 181-192.

Klein, C. J., Botuyan, M. V., Wu, Y. H., Ward, C. J., Nicholson, G. A., Hammans, S., Hojo, K., Yamanishi, H., Karpf, A. R., Wallace, D. C., Simon, M., Lander, C., Boardman, L. A., Cunningham, J. M., Smith, G. E., Litchy, W. J., Boes, B., Atkinson, E. J., Middha, S., Dyck, P. J. B., Parisi, J. E., Mer, G., Smith, D. I. and Dyck, P. J. (2011), 'Mutations in Dnmt1 Cause Hereditary Sensory Neuropathy with Dementia and Hearing Loss'. *Nature Genetics,* 43/6: 595-U140.

You can change this by formatting your bibliography

1. Open your Word document:
2. Click on the *EndNote* tab to access the EndNote tools
3. Click on the arrow next to *Bibliography* to access the *Format Bibliography* fly out menu



4. Click on the Layout Tab
5. Change the Hanging Layout to read 0cm (see below)
6. You can also change the font and title of the bibliography here

Creating Subheadings for your Reference List

EndNote allows you to organise your Reference list with subheadings. You can display references in groups by reference type or with your own headings

References

Books

Burton, S. L., Alvarez, J., Cardany, A. B., Cecconi-Roberts, L., Cooper, S., Dansereau, D., et al. (2011). *Learning from young children : Research in early childhood music*. Lanham: R&L Education.

Conference papers

Parker, R. (2012). *What the library did next: strengthening our visibility in research support*. VALA2012, Sydney, retrieved from http://hdl.handle.net/1959.3/214486

Journals

Arrigolni, F., Ahmetaj, B., & Leiper, J. (2010). The Biology and Therapeutic Potential of the DDAH/ADMA Pathway. *Current Pharmaceutical Design, 16*(37), 4089-4102.

Asche, F., Bennear, L. S., Oglend, A., & Smith, M. D. (2012). U.S. Shrimp Market Integration. *Marine Resource Economics, 27*(2), 181-192.

Biley, F. C., & Smith, K. L. (1998). Exploring the Potential of Problem-Based Learning in Nurse Education. *Nurse Education Today, 18*(5), 353-361.

References

Early Childhood

Bruce, T. (2011). *Early childhood education*. Milton park, Abingdon, Oxon.: Hodder Education.

Burns, M. S., Assaf, M. M., & Johnson, R. T. (2012). *Preschool education in today's world: teaching children with diverse backgrounds and abilities*. Baltimore: Paul H. Brookes.

Desailly, J. (2012). *Creativity in the primary classroom*. London: SAGE.

Higher Education

Bicen, H., Ozdamli, F., & Uzunboylu, H. (2012). Online and blended learning approach on instructional multimedia development courses in teacher education. *Interactive Learning Environments*, 1-20. doi:10.1080/10494820.2012.682586

Keengwe, J., & Kidd, T. T. (2010). Towards Best Practices in Online Learning and Teaching in Higher Education. *Journal of Online Learning and Teaching, 6*(2).

Library

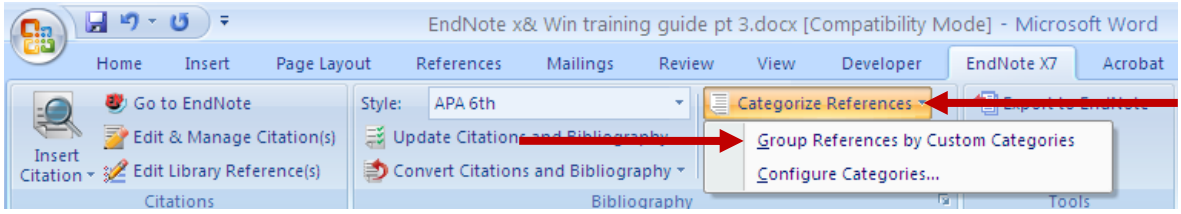
Booth, M., Schofield, S., & Tiffen, B. (2012). Change and our future at UTS Library: It's not just about technology. [Article]. *Australian Academic & Research Libraries, 43*(1), 32-45.

Cox, B. C., & Jantti, M. (2012). Discovering the Impact of Library Use and Student Performance, *Educause Review Online*. Retrieved from http://www.educause.edu/ero/article/discovering-impact-library-use-and-student-performance

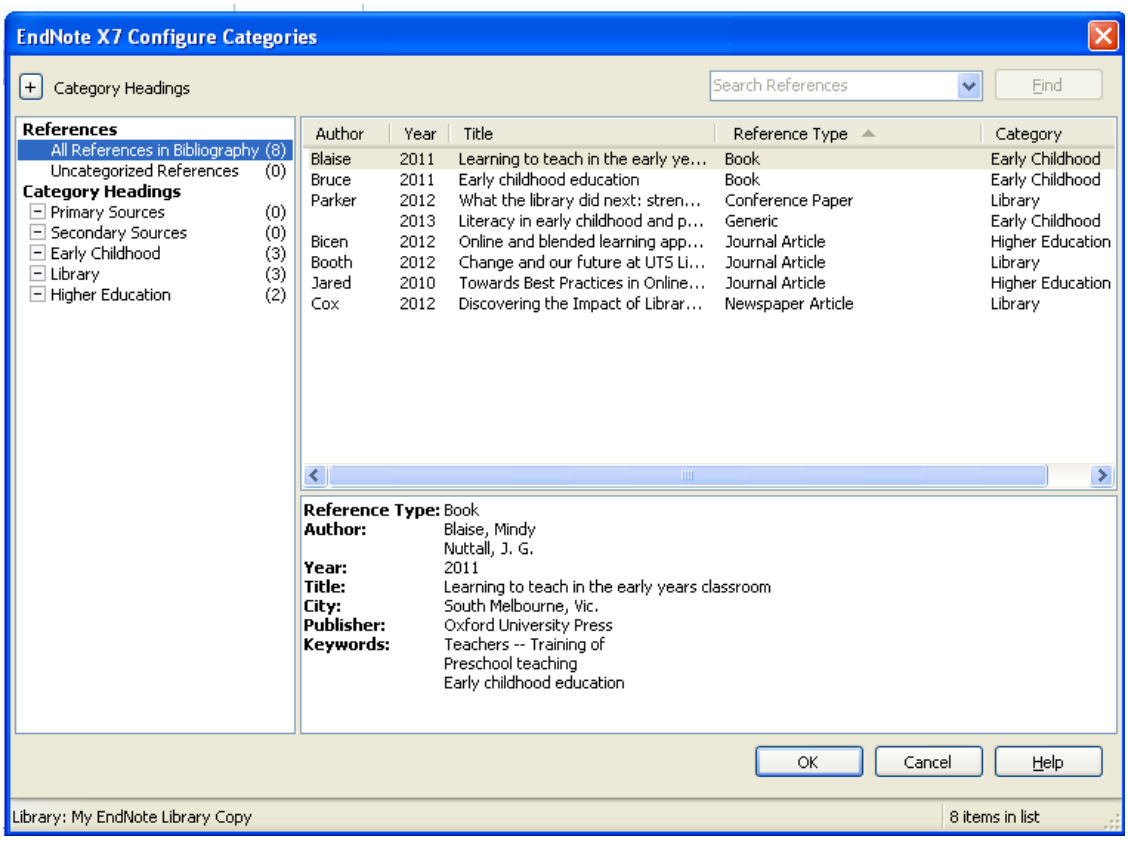
Parker, R. (2012). *What the library did next: strengthening our visibility in research support*. VALA2012, Sydney, retrieved from http://hdl.handle.net/1959.3/214486

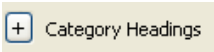
Configure your reference list to display headings

1. Click on Categorize References in your EndNote toolbar
2. Click on Group References by Custom Categories



3. Click on Configure Categories to input the headings you require



4. Add category headings by clicking on 

5. Drop and drag the references into the appropriate headings
6. You can arrange the order of the headings by dragging them to the appropriate position in the list
7. References not placed in a category will appear in the Uncategorized section of the reference list

Output Styles

An output style determines how the selected reference will be formatted and displayed when you print, export, preview and create in-text citations or footnote citations and bibliographies for all types of references. For example, a record formatted in the APA 6th style would look like this:

> Argus, M. V., & Matthews, E. K. (1991). Stratigraphic excavation techniques for palaeontologists. *Journal of Palaeontology*, 17, 119-127.

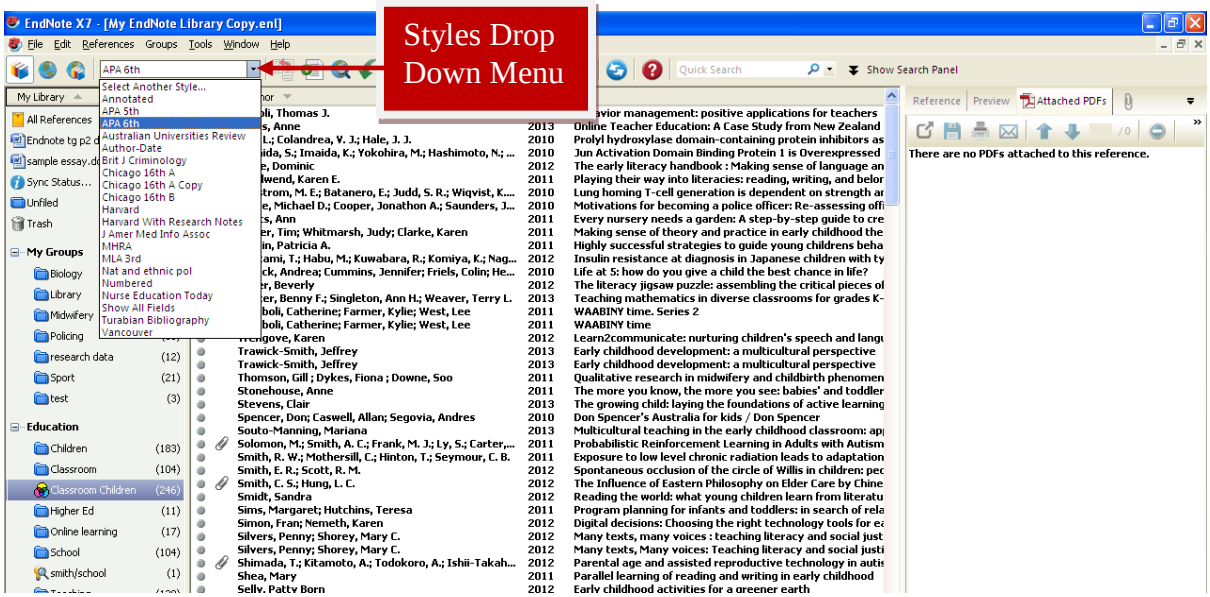
and the same record formatted in the Nature style would look like this:

> 1. Argus, M. V. & Matthews, E. K. Stratigraphic excavation techniques for palaeontologists. Journal of Palaeontology 17, 119-127 (1991).

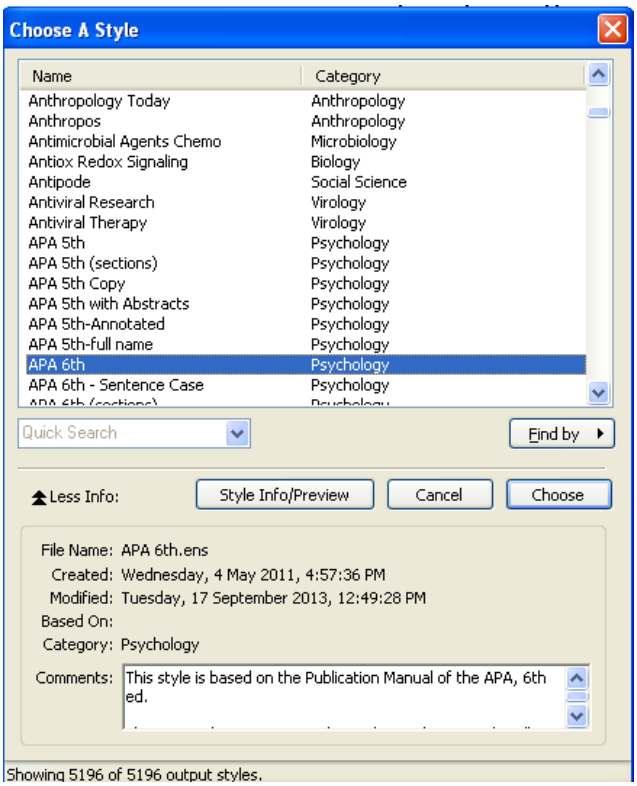
EndNote includes the most popular styles by default, including APA 6th, Chicago B, and individual publication specific styles such as Nature. Many more styles can be downloaded from the EndNote™ website at www.endnote.com/support/enstyles.asp

To Activate a Different Style:

The three default styles (Annotated, Numbered, and Show All Fields) are not appropriate for Charles Sturt University requirements and you will need to select another style. Most Schools at CSU have adopted the APA 6th edition. Please check the required style for your School or Faculty with your lecturer. For more information on referencing see: http://student.csu.edu.au/study/referencing-at-csu



1. Click on the *Current Style* drop down menu
2. Click on *Select another style*
3. Scroll down the list alphabetically by name, or by category
4. If you wish to search by category, click on the grey category title bar or click on the *Find by* button underneath the list



5. Click on the name of the required output styles to select them
6. Click on *Choose*

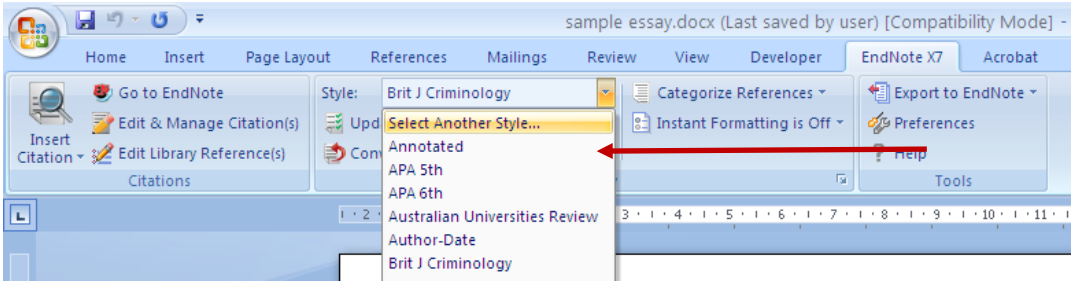
If you wish to add another style, repeat steps 2-6.

To Remove a Selected Style

1. Select the style in the *Current Style* drop down menu
2. Click on the *Edit* drop down menu
3. Click on *Output Styles*
4. Click on *Open style manager*
5. The alphabetic list should open at the selected style. Uncheck the ticked box next to your style to remove it from your list
6. Click on the Close box [x] for the style manager window. The style should no longer appear in the Current Style drop down menu

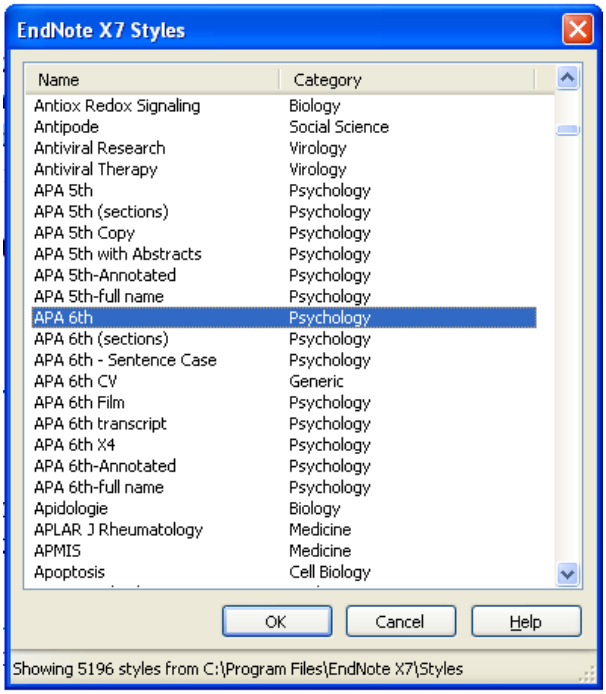
To Activate a Style Within Word

1. Click on the Current Style drop down menu.



2. If it appears in the quick list select it, or;
3. Click on *Select Another Style*

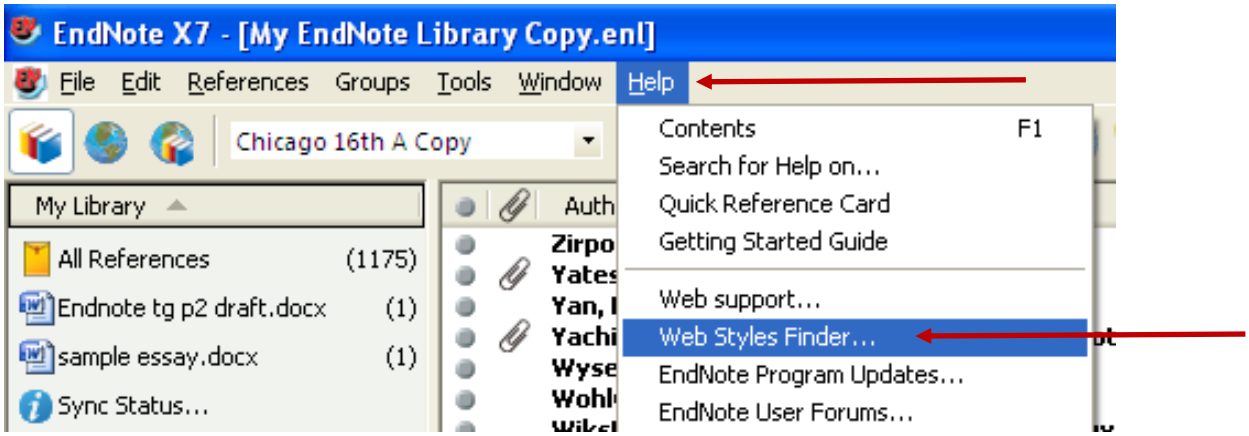
4. Click on the grey 'Name' header. You can then scroll down the list alphabetically by name



5. Click on the name of the output style you wish to select
6. Click *OK*

Downloading, Saving and Opening Additional Styles

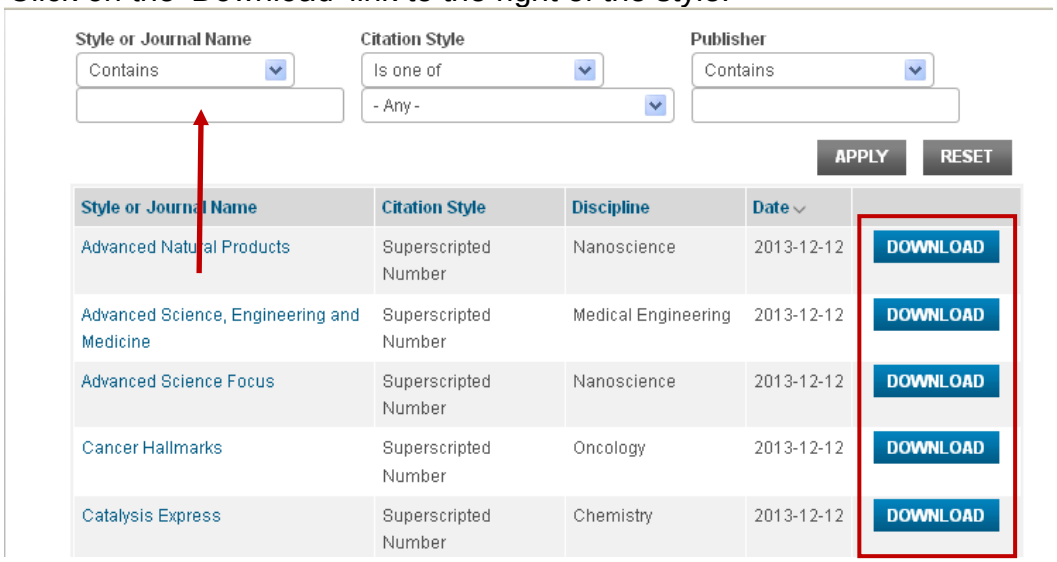
You can download additional output styles for EndNote X7 from the Thomson Reuters support site for EndNote by clicking on the 'Help' menu at the top of the EndNote screen and selecting 'Web Styles Finder…'. You can then search for the style you need on the Thomson website at: www.endnote.com/support/enstyles.asp



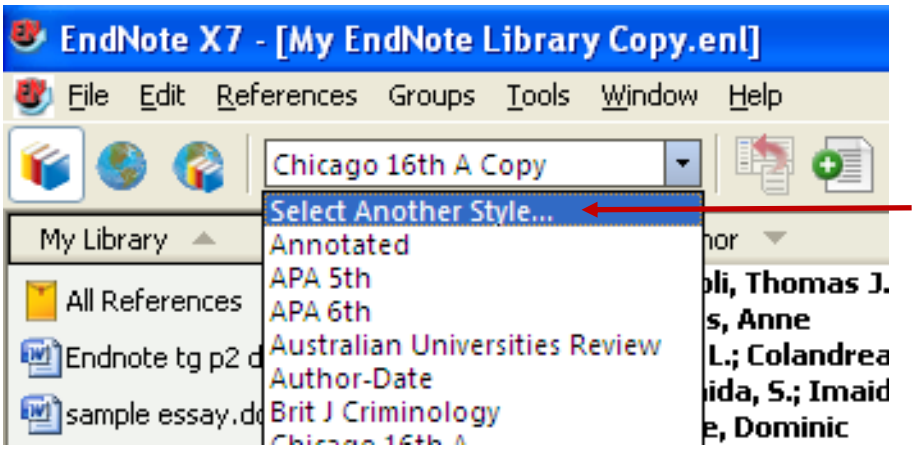
To install and use a style:

1. Locate the style you want using the EndNote 'Web Styles Finder' by either browsing through the list or searching for the style by journal name.

2. Click on the ‘Download’ link to the right of the style.



3. Save this file somewhere on your computer (the desktop is a good location as files are easy to find there).
4. Double-click on the file (this should open the file in EndNote).
5. Click on ‘File’, ‘Save As’ in EndNote.
6. Remove the word ‘Copy’ from the end of the style name and click on the ‘Save’ button. EndNote will save the file in the appropriate folder.
7. To use the referencing style, click on the drop-down arrow next to the style window in EndNote and click on ‘Select Another Style’.



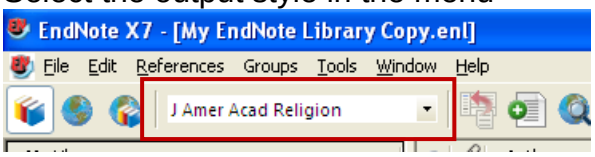
8. Once the style manager opens, navigate to the new style and double click it to select it as the active style in your library.

Editing Output Styles

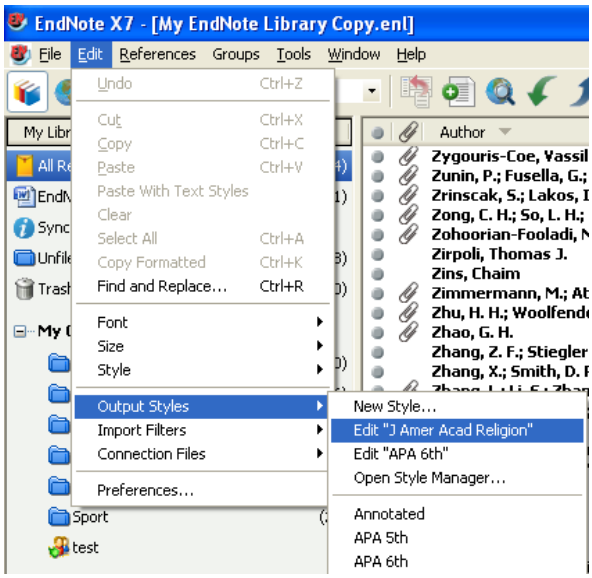
Sometimes, an existing output style does not meet your publishing needs, so you may need to edit an existing style or create a new output style.

To edit an existing style

1. Select the output style in the menu



2. Click on Edit > Output Styles > Edit '*Your selected style*'



3. The window that opens contains the display settings for Citations, References and Footnotes for this style

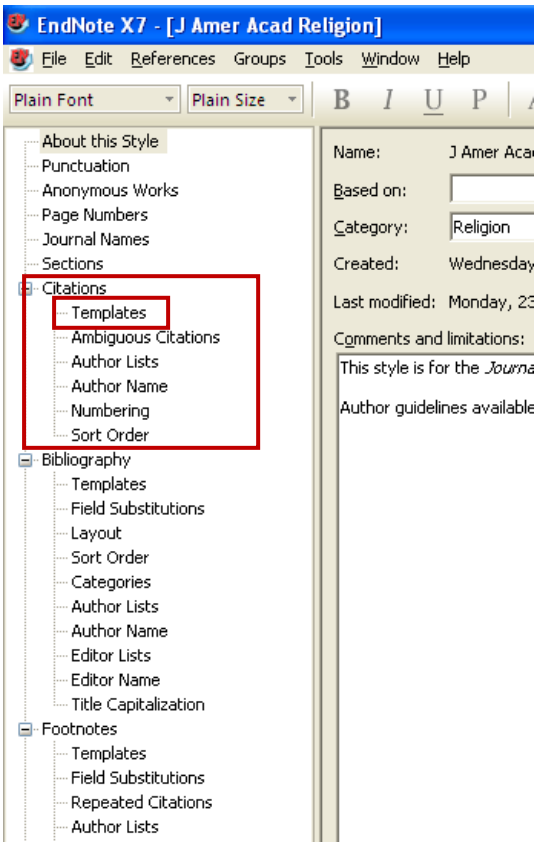
There are many different settings you can change, including how to display

- changing the punctuation of the in-text citations – Templates
- different items by the same author, publishing in the same year – Ambiguous Citations
- listing authors when there are more than one for a reference – Author Lists
- sorting the citations when listed together in brackets – Sort Order

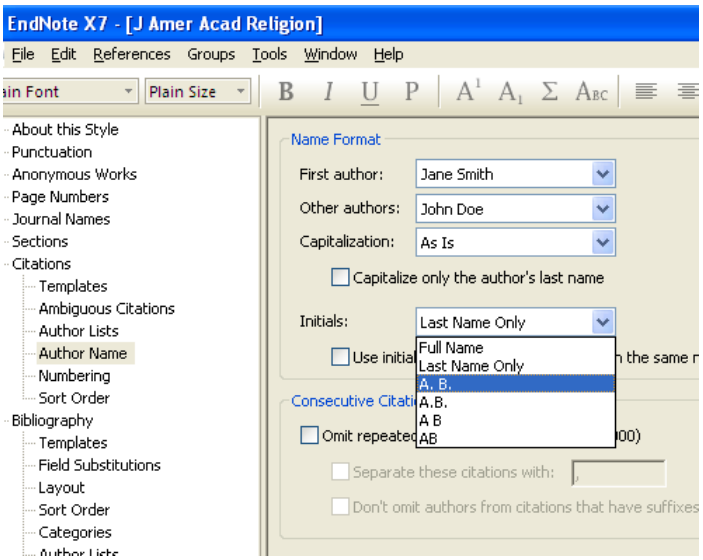
Editing author display

You can also choose to change the way the author is displayed, you may wish to display the author's surname and initials rather than just the surname.

1. Select Author Name in the Citations menu



2. In the drop down menu next to Initials, select the option you wish to display



3. Save the changes by clicking on File > Save
4. To update the citations in your Word document to show the changes you have made to the output style, you will need to click on “Update Citations and Bibliography” on the EndNote toolbar in Word

Editing bibliography display

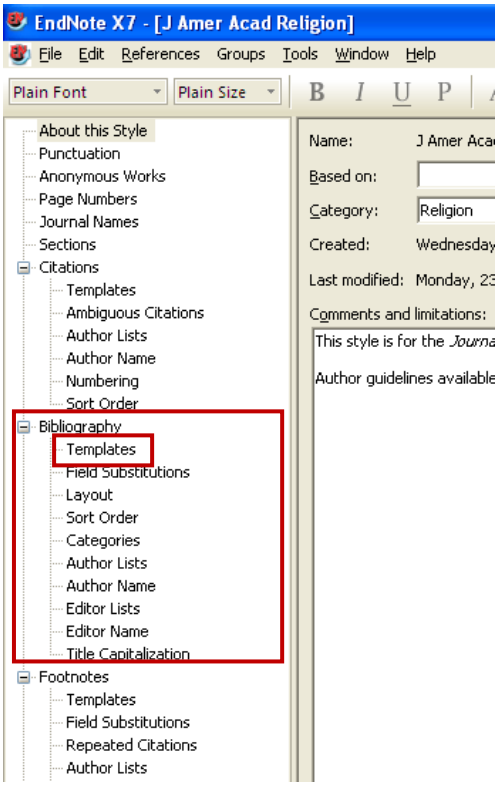
There are many different settings you can change, including how to display

- different items by the same author, publishing in the same year – Ambiguous Citations
- sorting the order of the references in the bibliography – Sort Order
- listing authors when there are more than one for a reference – Author Lists
- how an author is displayed – Author Name
- listing editors when there are more than one for a reference – Editor Lists
- how an editor is displayed – Editor Name
- how the titles should be capitalized – Title Capitalization

Editing templates

You can also choose how the references are punctuated and displayed for each reference type, including what headings are included from the record.

1. Select Templates in the Bibliography menu



2. To add a reference type - select it from the Reference Type button at the top of the screen
3. **To alter the format** - Highlight the text & use Formatting buttons above the In-Text Citations window
4. **To alter punctuation** - type or delete punctuation as required

EndNote uses special characters or 'fields' to control how a record appears in the bibliography. Place your cursor where you want the character in the template. Go to '**Insert Field'** on the top right and select the appropriate character:

- **Singular/plural (^ caret symbol)** - used if there is different text for singular/plural forms e.g. (Ed.),^(Eds.)
- **Link adjacent text** - a non-breaking space (shown as a small grey diamond in the template) used to link adjacent text to a field so text doesn't appear if the field is empty
- **Forced separation (| pipe symbol) -** used to separate punctuation from adjacent fields. e.g. you might want a full stop at the end no matter what fields are empty
- **Field names as literal text (`back apostrophe symbol) -** used if you want text in your records that has already been used as a field name e.g. if you want the word 'year' as well as the field year
- **To remove a field** - Highlight > click **Delete** on your keyboard

Remember to save the output style as you go.

TIP! You can also rename your output style to identify it from an existing one by clicking on File > Save As.

TIP! It is a good idea to test your output style on a test word document

Abbreviated Journal Titles and EndNote Term Lists

EndNote provides a number of terms list to ensure that the journal names in your bibliography are either the full name or abbreviation according to your required output style. To set up your terms list, first make a backup of your library. Then, follow the steps below.

1. In EndNote, go to "Tools > Open Term Lists > Journal Terms List".
2. Highlight the first journal term, and select [Ctrl]+A to select all, ([Command]+A on a Macintosh
3. **Note:** If the Journal Terms List is empty, skip to step 4.
4. Next, select "Delete Term" to delete all old terms.
5. Go to the "Lists" tab at the top, and select the "Import List" button.
6. Browse to the Term Lists folder within the EndNote folder, and choose to open the file according to your required journals.

    - For a Windows machine, this folder should default to:
      C:\Program Files\EndNote (EndNote Version Number)\Term List
    - or on a 64-bit Windows machine, this folder should default to:
      C:\Program Files (X86)\EndNote (EndNote Version Number)\Term Lists
    - On a Mac, this folder should default to:
      Hard Drive: Applications: EndNote (EndNote Version Number): Terms

7. This will import the correct abbreviations into your library's term list.
8. Next, to select the correct substitution, go to "Edit > Output Styles > Open Style Manager".
9. Highlight the style you are using and select "Edit".
10. Select "Journal Names" on the left.
11. Using a new document, test that the style is using the Full Name or one of the Abbreviations as needed.

Adding a Simple Bibliography to an Existing Word Document

You may have already written a Word document. The citations are entered into EndNote and all you want to do is cut and paste a properly formatted bibliography onto the end of the Word document.

At the EndNote Reference List screen:

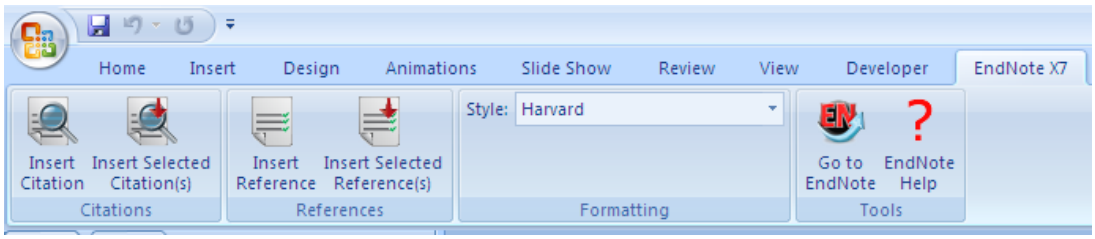
1. Select the output style you wish to use from the Current Style box e.g. *APA 6th*
2. Select the references:
3. For multiple references, use *Ctrl* and click with your mouse
4. For a block of references, use *Shift* and click with your mouse
5. For all references, click on the *Edit* menu and click on *Select All*
6. Click on the *Edit* dropdown menu
7. Select *Copy formatted* or press *Ctrl + K*
8. Open the Word document
9. Use the *Ctrl + V* command to paste the references or
10. Click on the *Edit* menu
11. Click on *Paste*

The new document is now independent of EndNote. You can modify the information in any way, and it will not affect the EndNote library.

Adding References and Citations to PowerPoint Slides

You can use EndNote to generate citations and references within a PowerPoint Slide. This is not the Cite While You Write function as you would see in Word – A reference list will not be created at the end of the PowerPoint presentation.

After you have installed EndNote X7, you will see that an EndNote X7 toolbar has been added in PowerPoint.



Adding a Citation to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click on the text box in which you wish to add the Citation
3. Click on Insert Citation on the EndNote toolbar and locate your record
4. Click on Insert

TIP! As in Word, you can choose to display the citation in different formats, i.e., Author(Year), Excluding Author.

TIP! Unlike Word, this citation is inserted as plain text, so if you wish to remove it or edit it, you can do so as normal text. Similarly, you need to choose the Output Style before you insert the citation

Adding Multiple Citations to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click on Go To EndNote
3. Select the records and return to PowerPoint – **do not use** the Return to Word Processor button in EndNote
4. Click on Insert Selected Citations

Adding a Reference to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click on the text box in which you wish to add the Reference
3. Click on Insert Reference on the EndNote toolbar and locate your record
4. Click on Insert

TIP! Unlike Word, this reference is inserted as plain text, so if you wish to remove it or edit it, you can do so as normal text. Similarly, you need to choose the Output Style before you insert the reference.

Adding Multiple References to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click in the text box in which you wish to add the Reference
3. Click on Go To EndNote
4. Select the records and return to PowerPoint – **do not use** the Return to Word Processor button in EndNote
5. Click on Insert Selected References

Part 3 - Using EndNote on More Than One Computer

CSU's licence allows you to use EndNote on more than one computer, you can do this a couple of different ways.

Using an External Drive to Hold your EndNote Library

1. Create a Research directory on a USB Flash Drive or external hard drive
2. Keep your working Word files and EndNote library in that directory.
3. Always use the files in the Research directory on your flash drive.

You can then copy that entire directory to another source to back it up.

Only using the files on the USB prevents accidents like over-writing the most recent library with an older one, and stops you from 'breaking' links between EndNote and Word files if you move them to different directories.

Syncing your EndNote Library

EndNote allows you to have your Library available to you on multiple computers. You can sync your Library with EndNote's online facility, EndNote Online, and

subsequently sync the library with another computer, ensuring you have the same content available in your library, including attachments, on different computers you may use to do your research and writing. This service is provided as part of the CSU EndNote subscription.

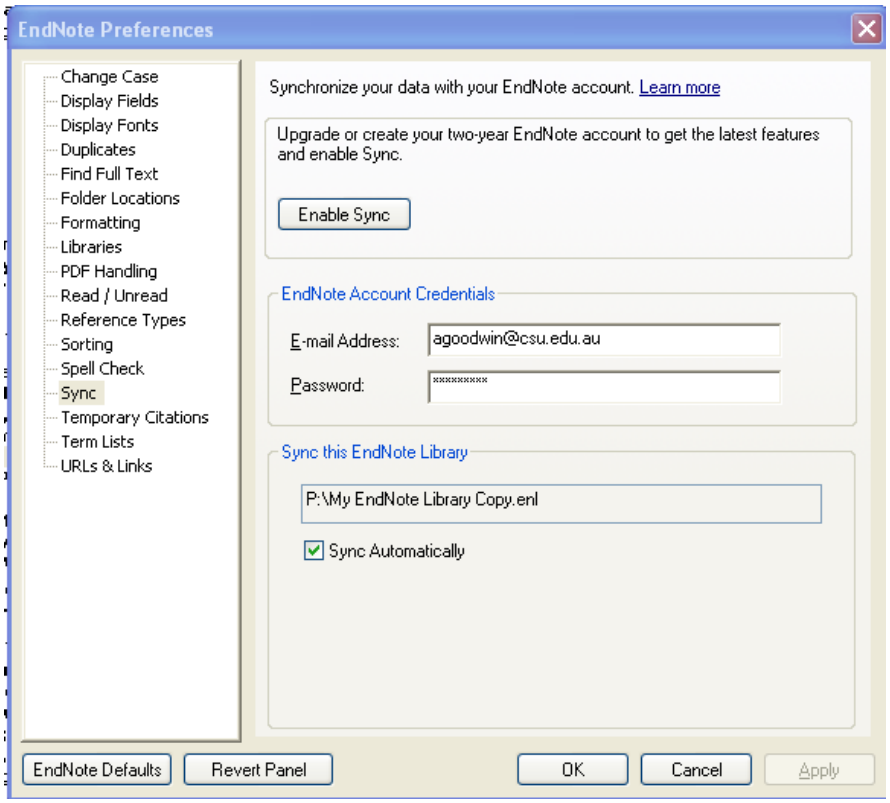
WARNING!

You can only sync one EndNote Library with EndNote Online. If you already have an EndNote Online account, your existing EndNote Online Library will be copied to your desktop library and your desktop EndNote library will be copied to your EndNote Online account.

Syncing with EndNote Online

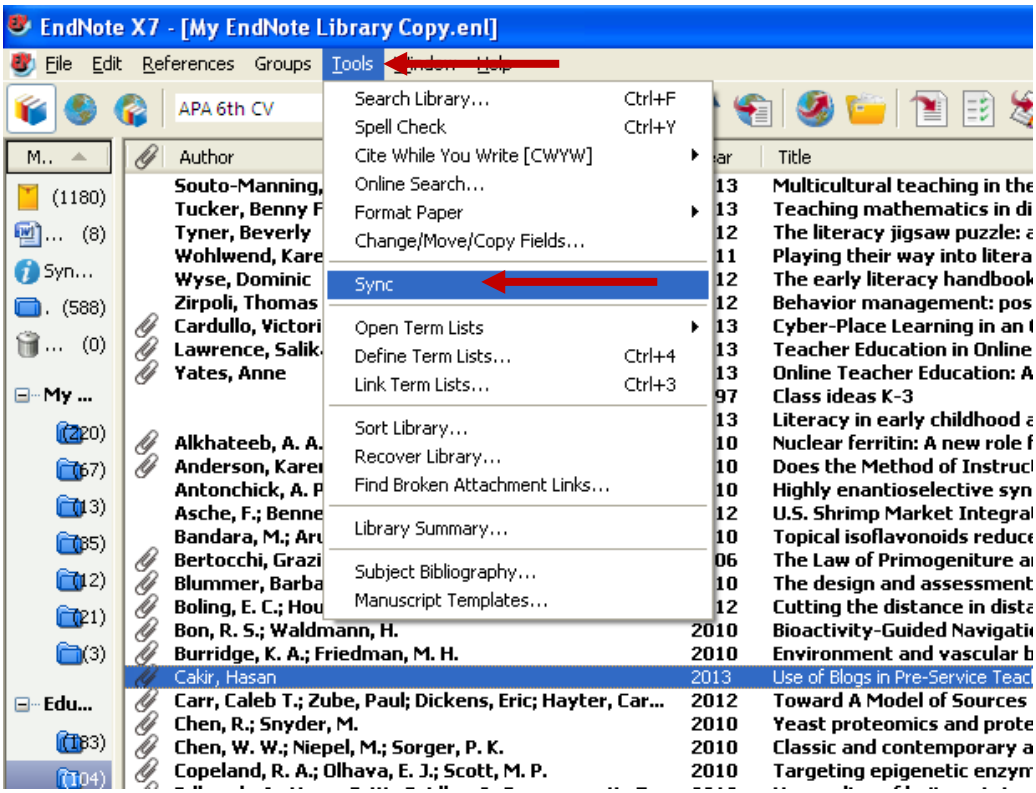
To sync with EndNote Online, you need to create an EndNote Online account. You can do this by going to the Sync Preferences in the EndNote Software

1. Click on Edit
2. Click on Preferences
3. Select 'Sync ' in the list on the left
4. If you already have an EndNote Online account, enter your details, if not, click on "Enable Sync"



5. You will then be asked to complete an online form, after doing so, you will have and EndNote Online account
6. Check that your Email address and Password are entered correctly in the Sync Preferences window
7. To sync your EndNote Library, ensure you have your Library open and created a copy of your library that is saved separately (just in case!)

8. Click on Tools
9. Click on Sync (EndNote will prompt you at this point to create a backup of your library if you haven't already)
10. Your Library will now be copied across to your EndNote Online account, with any references in your EndNote Online account brought into your desktop library. This may result in duplicates in both Libraries.



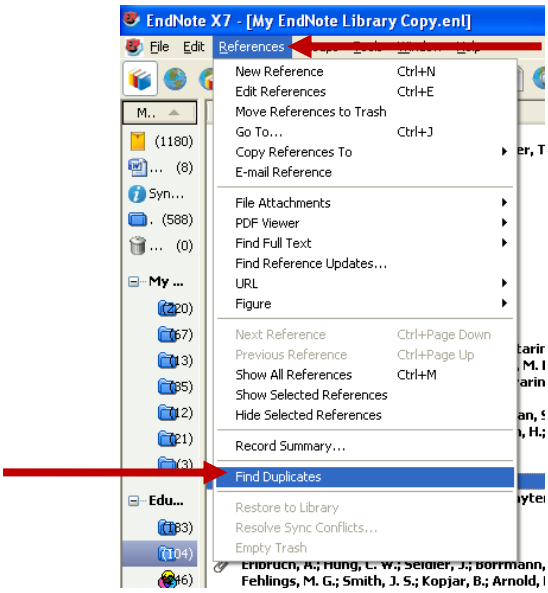
11. If you have a large library, this may take a while, but you can continue working with your EndNote Library as the syncing process will occur in the background

How to Delete Duplicate Records after Syncing with EndNote Online

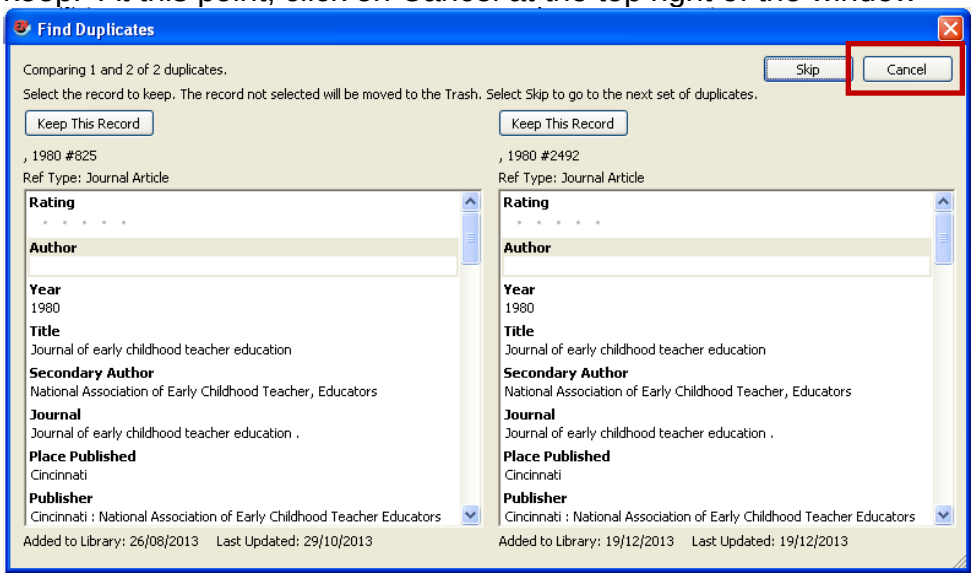
If you already had an EndNote Online account, the EndNote Libraries have been copied both ways, so you may now have duplicate records in your desktop library.

To identify duplicate records in your Library (this can be done at anytime)

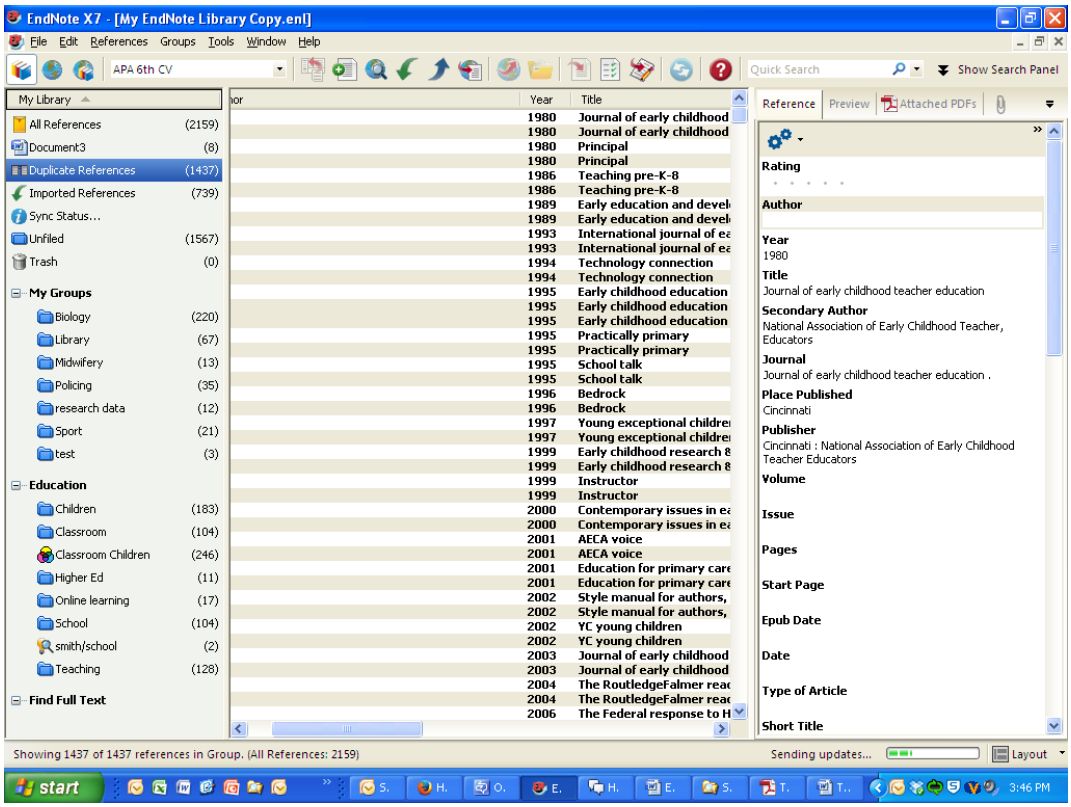
1. Select All References in the My Library pane
2. Click on References
3. Click on Find Duplicates



4. If any duplicates are found, a window will appear asking you which record to keep. At this point, click on Cancel at the top right of the window



5. You will now be presented with a the contents of the Duplicate Records folder with 2nd copies of the records highlighted in brown



6. To delete the highlighted records, hold down the CTRL key and click twice on one of the highlighted records
7. Hit the delete key on your keyboard
8. Empty your Trash Can
9. To delete the duplicate records from your EndNote Online Library, click on the Sync button . This will removed the deleted records from your EndNote Online library.

Syncing your EndNote Library on a 2nd Computer

These instructions assume you have already created and synced a library on another machine. Make a note of the name of the library.

1. Open EndNote on the second computer (Mac or Windows).
2. Click *File*
3. Click New
4. Create a new library with the same name as the original synced library.
5. Click the *Sync* button. (Windows) or (Mac) in the toolbar
6. Type your existing EndNote Online login and password into the *EndNote Online Account Credentials* fields
7. Click *OK*

Sharing Records with Colleagues

Copy and Email Records from your EndNote Library

You can save an EndNote library or group within your Library that will to a single compressed file that will include the records and any attachments. You can then email this file a copy to a colleague who can then expand the file and import it into their own EndNote library

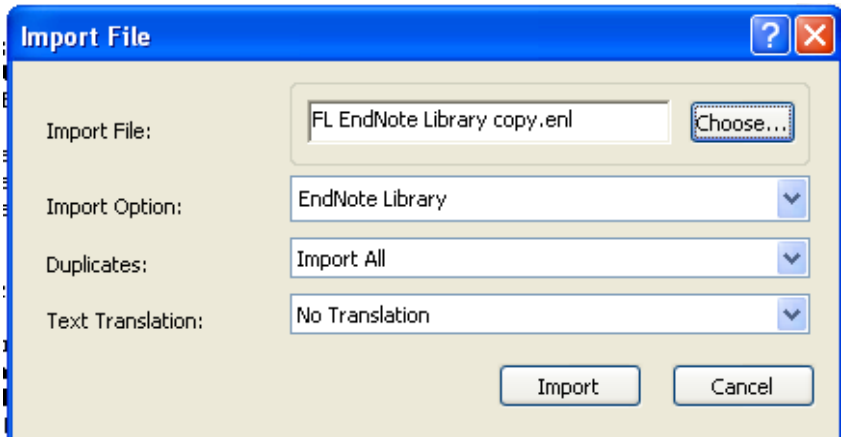
Creating a compressed Library File

1. Open the library in EndNote.
2. From the *File menu*, select *Compressed Library (.enlx)* to display a Compressed Library dialog.
3. Use the radio buttons to determine these options:
   - Specify whether you want to *Create a compressed library* or to *Create & Email the library*. (You will need to have a built in email program to use Create & Email. If you're using Gmail or Hotmail, you will need to use Create and then attach the file manually to your outgoing email.)
   - Specify whether you want to save file attachments with the library or not.
   - Specify whether you want to save
   - all references to the compressed library,
   - only the selected (highlighted) references, or
   - only the references in a specific group or group set.
4. Click OK to display a file dialog.
5. Save the compressed library (default name is Sample_Library_X6.enlx) to a folder on your hard drive.

You can rename the file name but you cannot use the following characters.\, /, : , *, ? , " , < , > , | . If you selected the Create & Email option, EndNote will launch your default email system, create a new email, and attach the compressed library file to the email. Enter additional information to the email, such as a recipient, subject, and message. Click the Send button.

Restoring a compressed Library File

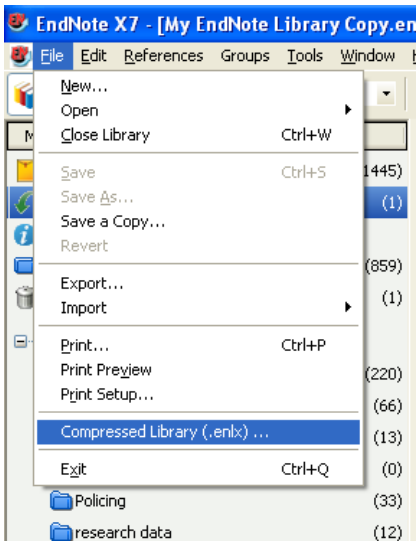
1. Use EndNote (version X or later) to open the filename.enlx file, which will extract the .ENL file and the .DATA folder to the same folder where the. enlx file is located.
2. Open the file using *File* > *Open* > *Open Library* and selecting the .enl file that was created when the compressed Library was restored.
3. Alternatively you can import the restored Library directly into your own EndNote Library by using *File* > *Import* > *File.* Select the .enl file that was created when the Library was restored. Make sure that you select to Import Library and decide whether you want to import duplicates. Click on Import.



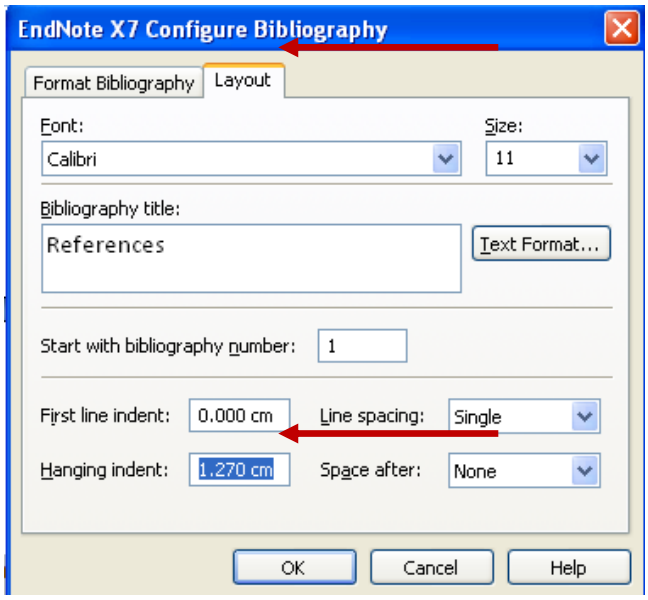
Document Groups

Document groups are create each open document that has EndNote references in it. Document groups will show up in the group window under the 'All References' group. This group is useful for sharing references in a document with colleagues as the references in the group can be copied to a new library and thus shared. To share these references with a colleague:

1. Select the appropriate document group
2. Click on a reference in the group
3. Click on 'Edit', 'Select All' to select all of the references in the group
4. Click on 'References', 'Copy References To' and select 'New Library'
5. Save the Library with a distinctive name (giving it the same name as the document would help identify the library)
6. With the new library opened, click on 'File', 'Compressed Library (.enlx)'. This will merge the data folder with the library file for easy distribution to colleagues



7. To email the library, within the Compressed Library settings, select 'Create & Email'. You can choose to include any attached PDFs or to send only the reference data. Please note that including PDFs in your shared library may constitute a breach of Copyright law.



Sharing Groups Using EndNote Online

EndNote Online allows users to collaborate with the Share Groups feature. You may wish to share an existing group or create a new group to share.

To access EndNote Online, go to www.myendnoteweb.com and use the email address and password you used to sync your Library.

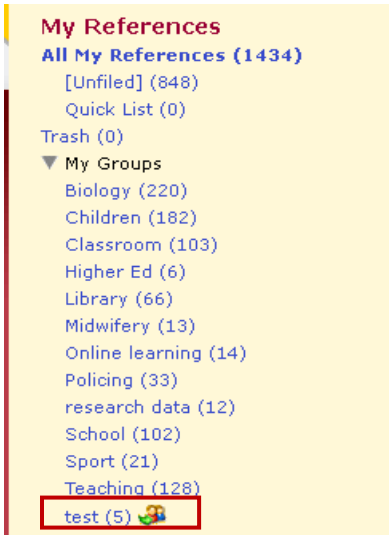
To Create a New Group to Share

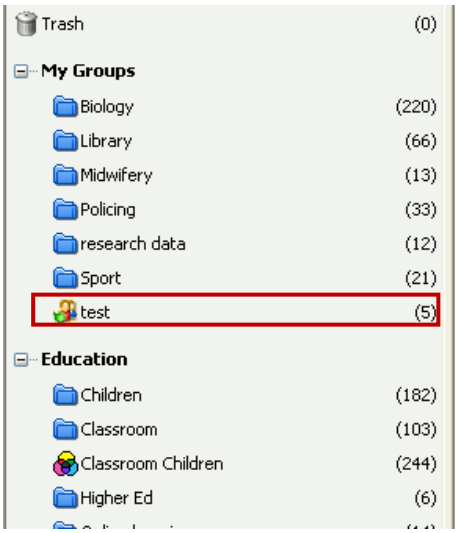
1. Logon to your EndNote Online library
2. Click on *Organize* - then *Manage My Groups*
3. Select *New Group* and name it
4. Select the citations you would like to add into the New Group
5. Click on the arrow from the drop-down Add To Group menu
6. Add your references to the selected group

How to Share a Group

1. In EndNote Online, click on *Organize* and then on *Manage My Groups*
2. The Manage My Groups window opens and shows the groups you have created and their status
3. Select the *Share* column; check the square box to the left of the group you wish to share and choose the *Manage Sharing* button
4. Click on start *Sharing this Group*
5. The add email addresses window opens; add email addresses for those you wish to share your group with
6. Select the button to allow the person to *Read Only* or *Read & Write*
7. Click *Apply*

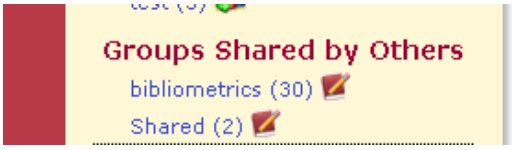
When your group has been shared, it will appear in the list in EndNote Online and your desktop Library like this





Importing Records from a Colleague's Shared Group

A shared group from a colleague will appear at the bottom of your Library in EndNote Online, but will not be synced with your desktop library.



To move these references into your Library

1. Click on the shared Group
2. Select the references you wish to add to your Library, you can choose All references or select specific ones
3. At the top of the page, select the group you wish to add the references to, it can be an existing group or a New Group

The next time your desktop EndNote Library is synced with EndNote Online, these records will be added. You will not see other's shared groups in your desktop library.

Adding Records to a Colleague's Shared Group

To add records to a shared group from your Library,

1. In EndNote Online, select the records you wish to share
2. At the top of the page, select the shared group you wish to add them to

TIP! Although you can share a record with a colleague, you will not be able to share attachments using this method. Alternatives - email the PDF to a colleague, or send them a compressed file of your EndNote Group with attachments included.